

Our Webinar Will Begin Shortly

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My speaking language: English ▸

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Q&A



Show captions



Record



More



Meet the Presenter



Teavy Leonardson



- **Role:** Senior Training Specialist
- **Tenure at HHAeXchange:** 3 years
- **Areas of Expertise:** Implementation & Training
- **Fun Fact:** I visit the Finger Lakes every summer.

Humana Healthy Horizons of Virginia Milestone 2: Scheduling & Visit Capture

September 2025

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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



Schedule and Visit Capture

Overview



This training introduces the scheduling and visit capture features in HHAeXchange. These tools enable providers to set up schedules and allow caregivers to perform Electronic Visit Verification (EVV), making it easier to maintain compliance and prepare for billing.

Who should take this training?

- Agency staff who train and manage caregivers.
- Coordinators that set schedules.

Objectives of Today's Webinar

You will be able to:

1. **Define** what scheduling and EVV capture is and explain it's purpose in the overall workflow.
2. **Recognize** the key differences between scheduling and visit capture.
3. **Navigate** the patient calendar, master week, and caregiver profiles.
4. **Perform** tasks such as activating the mobile app, scheduling master weeks, and EVV capture.



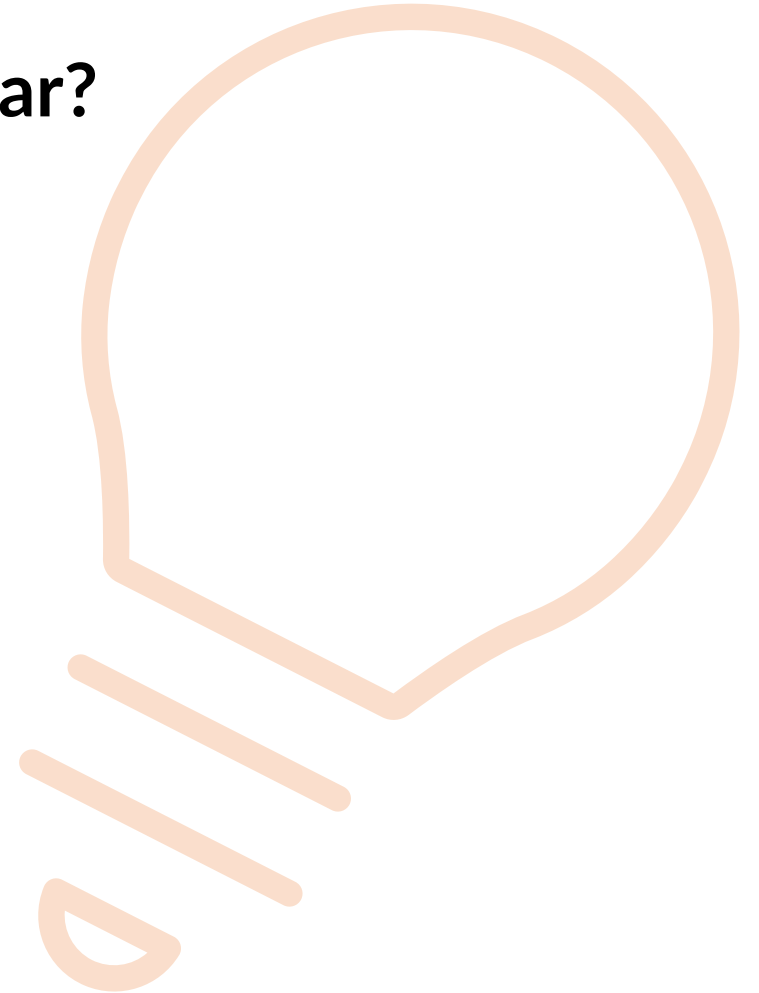
Knowledge Check

You'll see these throughout the presentation!



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

- A. Teavy
- B. Shanieka
- C. George
- D. Bill





Milestone 2 : Agenda

➤ EVV overview

➤ Scheduling

➤ Mobile app setup

➤ Capturing EVV

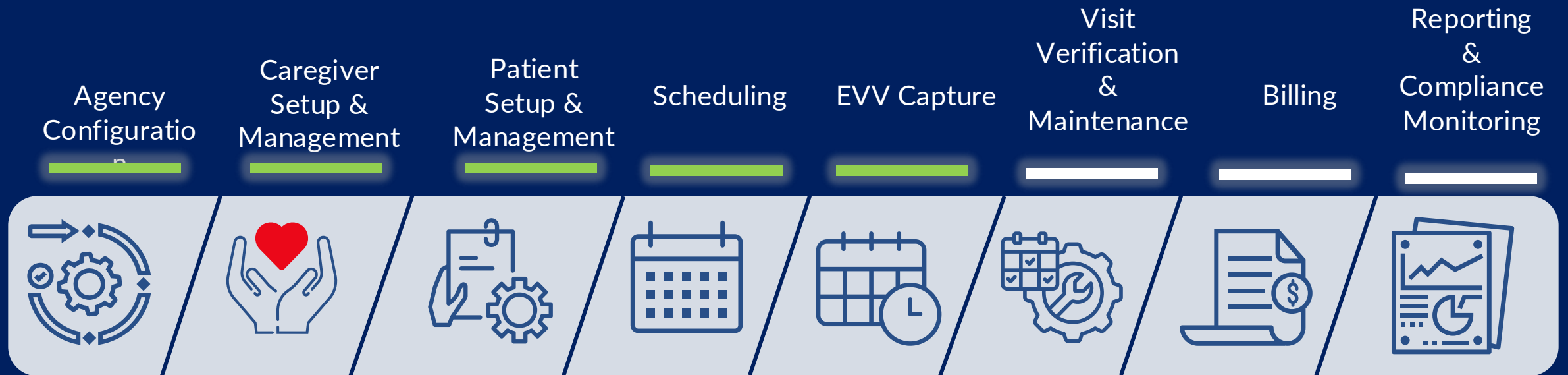
➤ Next Steps & Resources

➤ Questions

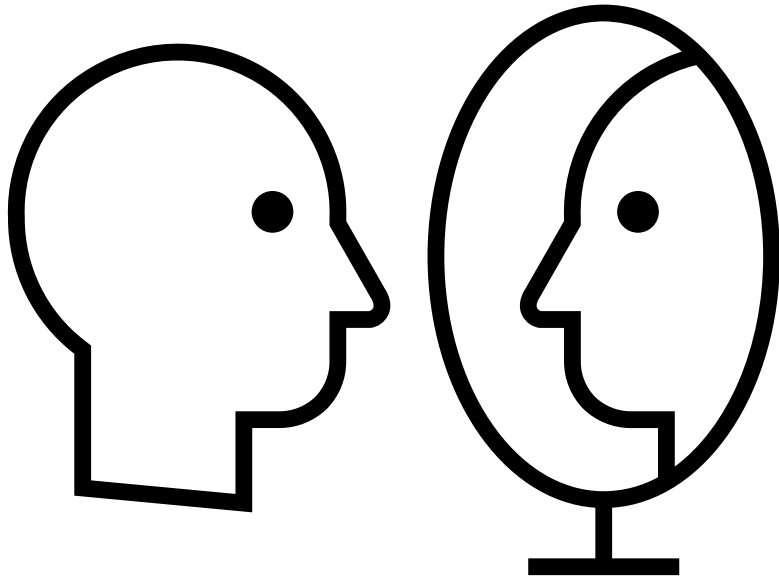


EVV Overview

EVV Tracker



Reflection Questions: EVV Lifecycle



- Where in this cycle do you spend most of your time day-to-day?
- In your role, which part of the EVV cycle do you interact with most?
- If that part of the cycle isn't set up correctly, how might it affect the steps that come after it?

> 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

HH AeXchange Standard System Terminology

Corresponding Terminology

CONTRACT / PAYER	- FFS - HHS	- MCO - State	- Plan
PATIENT / MEMBER	- CDS Employer - Consumer	- Recipient - Client	- Participant - Beneficiary
CAREGIVER	- Aide - Homecare Aid - Homecare Worker	- Worker - Direct Care Worker - Service Provider	- Attendant - CDS Employee
AGENCY / PROVIDER	- FMSA - Vendor	- Program Provider	
COORDINATOR	- Care Coordinator - Case Coordinator	- Service Coordinator - Care Types	
UNITY NUMBER	- EMPI - Master Patient Number	- Shared Patient Number	
SECONDARY IDENTIFIER	- MPI - Promise Code		



Scheduling



Scheduling: Single Shift



Scenario:

As a coordinator, I can use the patient's calendar to schedule visits, ensuring the caregiver is on time and within authorization limits.

Steps:

1. Go to the **Patient'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.

Abrams Jason

Active

Home Phone
305-910-9437

Address
6421 E 36th St N, KOSCIUSKO, MS, 39090

Languages
--

Date of Birth
04/01/2000

Patient [Alt ID]
-- [21321312]

Admission ID
KHC-900084

Contract
Life Care Demo Payer (KHC)

Coordinators
Default

Office
UMA healthcare

> Patient Search

- General
- Contracts/Insurance
- Profile
- Auth/Orders
- Special Requests
- Master Week
- Calendar
- Visits
- POC/PCP
- Caregiver History
- Rates
- Family Portal
- Doc Management

Authorizations

Contract	Auth. #	From Date	To Date	Discipline	Service Code	Max Auth.	Type	Period	Max Period	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Remaining Auth.	Notes	Actions
Life Care Demo Payer (KHC)	10001881	02/01/2025	01/31/2026	PCA	T1019	900.00 hrs	Hourly	Monthly	82.25 hrs								872.00 hrs		...
Life Care Demo Payer (KHC)	654546654624232	03/01/2025	05/30/2025	PCA	T1019	N/A	Hourly	Weekly	1000.00 hrs								0 hrs		...
Life Care Demo Payer (KHC)	10001879	02/01/2025	02/28/2025	PCA	T1019:U1	N/A	Hourly	Entire Period	10000.00 hrs								0 hrs		...

Calendar

History

Legend

<

>

Month

Year

May

2025

Go

Add Weekly Variable Schedule

Add a Visit

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
28	29	30	1	2	3	4
5	6	7	8	9	10	11



Scheduling: Master Week



Scenario:

If the patient needs to have a recurring schedule, the admin perform this by creating a master week.

Steps:

1. Go to the **Patient'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.

Abrams Jason

Active

Home Phone

305-910-9437

Address

6421 E 36th St N, KOSCIUSKO, MS, 39090

Languages

--

Date of Birth

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Patient [Alt ID]

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Admission ID

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Life Care Demo Payer (KHC)

Coordinators

Default

Office

UMA healthcare

- Patient Search
- General
- Contracts/Insurance
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Calendar

History

Legend

Month

Year

May

2025

Go

Add Weekly Variable Schedule

Add a Visit

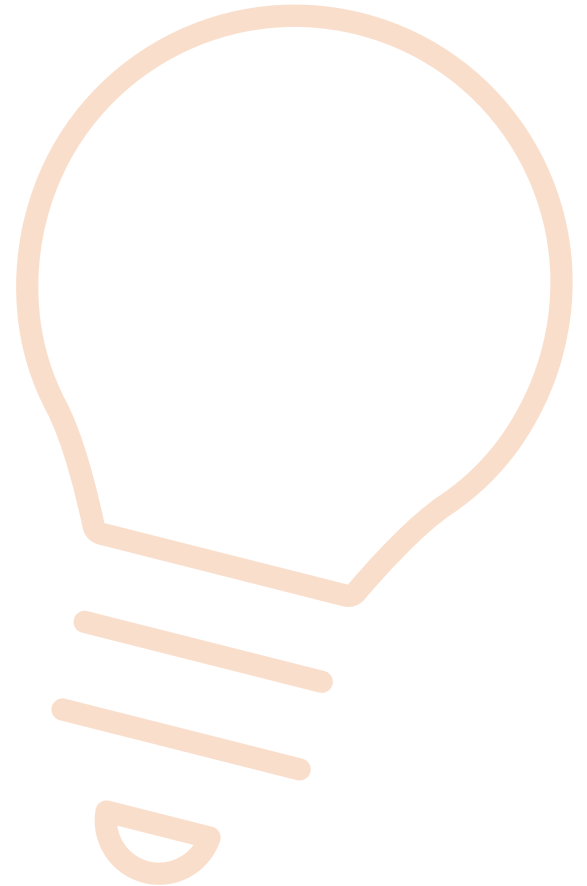
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
28	29	30	1 S: 01:15 PM - 02:15 PM V: Billed: N Martinez Greg	2	3	4

Knowledge Check



Why would an admin use the "Master Week" feature when scheduling a patient's visits?

- A. To schedule visits one day at a time
- B. To automatically bill visits at the end of the month
- C. To create a recurring weekly schedule for the patient
- D. To assign multiple caregivers to a single visit





Mobile App Setup

Scenario:

Barbara is comfortable 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 **Getting Started** in the mobile app.
3. Barbara can follow the steps to download the mobile app and register.

Got questions? Check out these resources!

What best describes you?



Agency / Provider

Administrators of day-to-day homecare business operations.



Caregiver

Experts in providing in-home care services.



Payer

Organizations responsible for claims and billing governance.



Third-Party EVV Integration

Partners in connecting agency data to payers using API or EDI.



Texas

Texas Program Providers and Financial Management Services Agencies (FMSA)

Trending Topics

Hi there 🙋

How can we help out today?





Mobile App Setup

Mobile App Search and Download



Scenario:

Barbara (caregiver) has reviewed the steps to setup the mobile app.

She will go to the app store and download the HHAeXchange mobile app.

Steps:

1. Caregivers should navigate to App store > Search for **HHAX mobile app**.
2. Download the **HHAX mobile app**.
3. Ensure location services are active.



Mobile App Setup

Mobile App Register



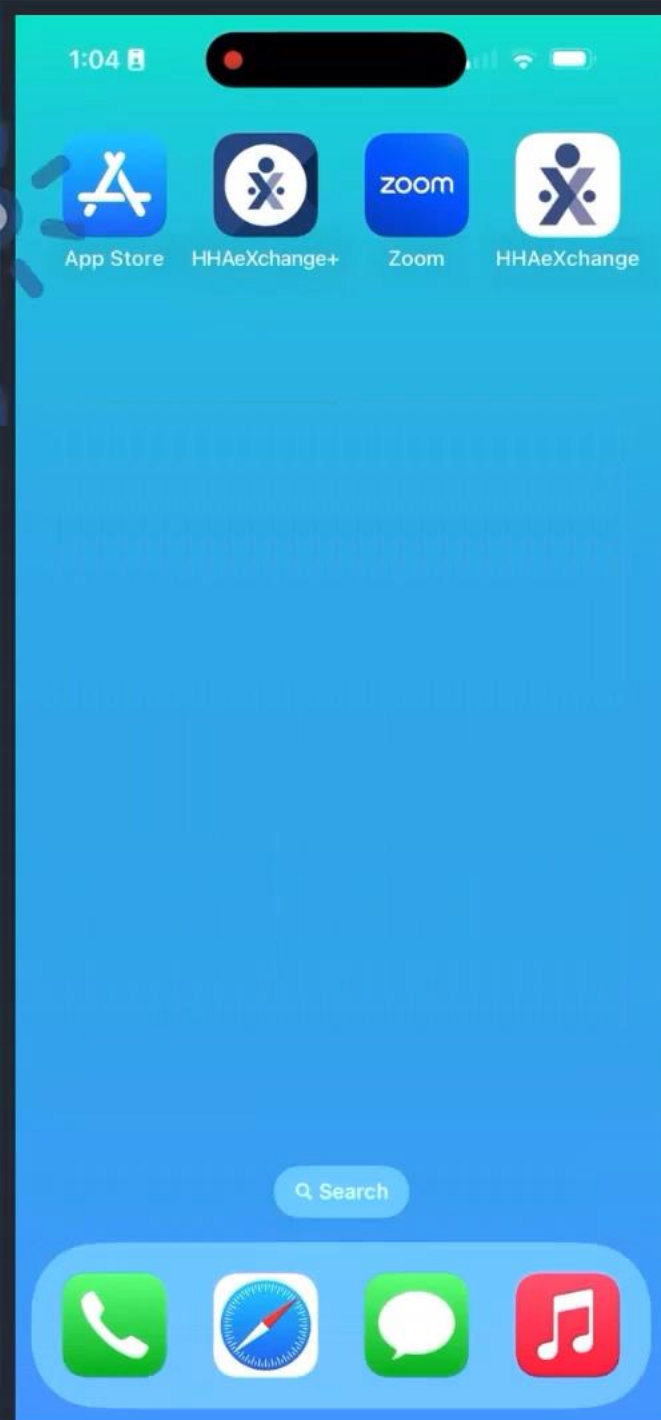
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Steps:

1. Caregivers should navigate to App store > Search for **HHAX** mobile app.
2. Download the **HHAX** mobile app.
3. Ensure location services are active.





Enable Mobile App Access

Enter Mobile ID



Scenario:

Barbara (caregiver) has opted to use the mobile app. You review her caregiver profile and enter the mobile ID in the mobile app settings.

Steps:

1. Search the **Caregiver's Profile**, select **Edit**.
2. In the **Caregiver Profile**, go to the **Mobile App Settings** section, enter the **Mobile ID**, and select **Mobile Type** as **Non-Clinical**.
3. Select **Save** to update the profile.



Insert Caregiver Mobile



- Insert Mobile ID under Caregiver Mobile section.
- Then select Mobile/Portal ID Type (Non-Clinical).

Home

Patient

Caregiver

Visit

Action

Billing

Report

Admin

Ortiz Lance

Active

Home Phone

Address

MIAMI, FL 33135

Languages

Date of Birth

1980-09-01

Caregiver Code

VGS-1003

Availability Updated

5/2/2025

Provider (Office)

MS Home Health Template Provider (Do Not Use) (MS Home Health Template Provider (Do Not Use))

Team

Select

Caregiver Hours

H 0 | V 0

Profile

Calendar

Visits

Preferences

Office Move

Q Search

First Name

Last Name

Caregiver Code

Search

Profile

Calendar

Visits

Preferences

Office Move

Q Search

First Name

Last Name

Caregiver Code

Search

Caregiver Type

Employee

Demographics

First Name

Lance

Initials

LO

Caregiver Code

VGS-1003

Secondary Offices

Marital Status

Contact Information

Address

MIAMI, FL 33135

Primary Phone

Secondary Phone

Tertiary Phone

Mobile App Settings

Enable Mobile Chat?

N/A

Mobile/Portal ID Type

Mobile Device ID

Employment Information

Status

Active

Employment Type

PCA, HHA, PA

First Name

Lance

Initials

LO

Caregiver Code

VGS-1003

Secondary Offices

Marital Status

Contact Information

Address

MIAMI, FL 33135

Primary Phone

Secondary Phone

Tertiary Phone

Mobile App Settings

Enable Mobile Chat?

N/A

Mobile/Portal ID Type

Mobile Device ID

Employment Information

Status

Active

Employment Type

PCA, HHA, PA

Middle Name

--

Gender

Male

Time & Att. PIN

100003

Ethnicity

--

Upload Picture

Date of Birth

09/01/1980

Social Security Number

444-55-2222

Country of Birth

--

History

Profile Log

Edit

Hello TestGeorgeMS1

- Placements (0 Pending)
- Events
- System Notifications
- Direct Messages
- Tasks
- Linked Communication

Placements

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

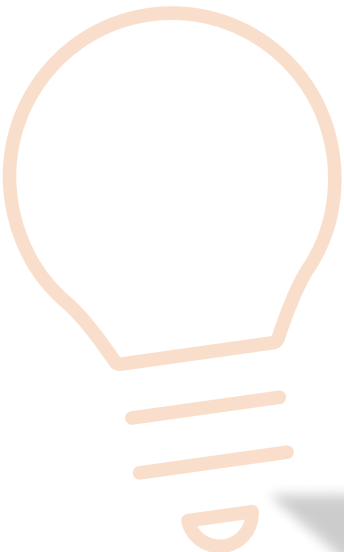
Patient ^	Admission ID	Office	Start Date	Stop Date	Frequency	Service Category	Service Type	Request Sent At	Status	Cut Off Time	Contract Name
-----------	--------------	--------	------------	-----------	-----------	------------------	--------------	-----------------	--------	--------------	---------------

No data available in table

Knowledge Check



Where in the caregiver's profile should you enter their Caregiver mobile ID?



MS Exchange

Ortiz Lance Active

Date of Birth: 1980-09-01
Caregiver Code: VGS-1003
Availability Updated: 5/2/2025

Home Phone:
Address: MIAMI, FL 33135
Languages:
Provider (Office): MS Home Health Template Provider (Do Not Use) [MS Home Health Template Provider (Do Not Use)]
Team: Select
Caregiver Hours: N/A | V/S

Profile | Calendar | Visits | Preferences | Office Move

Search
First Name:
Last Name:
Caregiver Code:
Search

Profile

Caregiver Type: Employee

Demographics

First Name: Lance
Middle Name:
Last Name: Ortiz
Initials: LO
Gender: Male
Date of Birth: 09/01/1980
Social Security Number: 444-55-2222
Country of Birth:
All Caregiver Code:
Time & Alt. PIN: 100003
Ethnicity:
Upload Picture:
Behire: No
Behire Date:
Dependents:
Marital Status:
Secondary Offices:
Contact Information

Address: MIAMI, FL 33135
Primary Phone: **A**
Secondary Phone:
Tertiary Phone:
Mobile App Settings

Enable Mobile Chat? N/A
Enable Mobile App Biometric 2-Factor Authentication:
Allow Caregiver to Select Community Visit: Yes
Caregiver Mobile/Portal ID: **D**
Mobile/Portal ID Type: **B**
Mobile Device ID: **C**
Employment Information

Status: Active
Employment Type:
History

Knowledge Check



- Insert Mobile ID under Caregiver Mobile section.
- Then select Mobile/Portal ID Type (Non-Clinical).



Do not Enter in the Mobile Device ID Field

HHAExchange Home Patient Caregiver Visit Action Billing Report Admin

Ortiz Lance Active

Date of Birth: 1980-09-01
Caregiver Code: VGS-1003
Availability Updated: 5/2/2025

Home Phone: --
Address: MIAMI, FL 33135
Languages: --

Provider (Office): MS Home Health Template Provider (Do Not Use) (MS Home Health Template Provider (Do Not Use))
Team: Select
Caregiver Hours: H 0 | V 0

Profile | Calendar | Visits | Preferences | Office Move

Q Search
First Name:
Last Name:
Caregiver Code:
Search

Profile

Caregiver Type: Employee

Demographics

First Name: Lance
Initials: LO
Alt.Caregiver Code: --
Rehire: No
Rehire Date: --
Dependents: --

Middle Name: --
Gender: Male
Time & Att. PIN: 100003
Ethnicity: --
Upload Picture:

Last Name: Ortiz
Date of Birth: 09/01/1980
Social Security Number: 444-55-2222
Country of Birth: --

Contact Information

Address: MIAMI, FL, 33135
Primary Phone: --
Secondary Phone: --
Tertiary Phone: --

Mobile App Settings

Enable Mobile Chat? N/A
Enable Mobile App Biometric 2-Factor Authentication
Allow Caregiver to Select Community Visit: Yes
Mobile/Portal ID Type: --
Mobile Device ID: --
Caregiver Mobile/Portal ID: --

Employment Information

Status: Active
Employment Type: PCA, HHA, PA

History



Visit Capture (EVV & IVR)



Scenario: Barbara is starting her shift today. She approaches the patient's home and is ready to use the Mobile App to clock in.

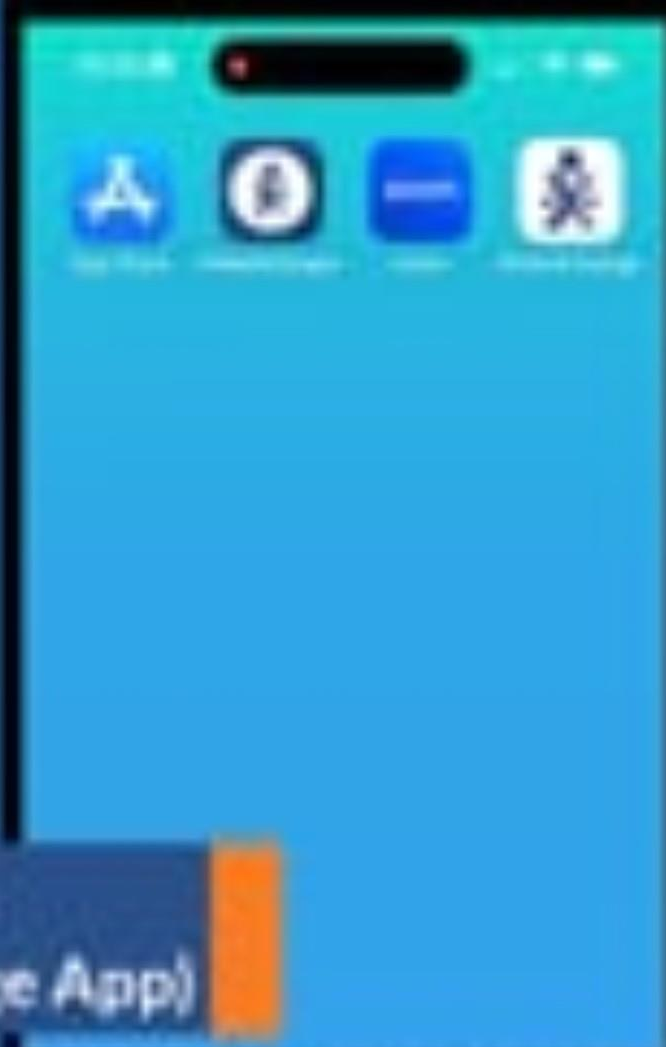
Steps:

1. Caregivers should open the **HHAX Mobile App** > **Log In** > Today's schedule.
2. **Tap** the scheduled visit, then **select** the **Clock In**.
3. **Confirm** GPS location, and **tap** continue.
4. Congratulations you are clocked in!

Scenario: Caregiver Barbara has completed her shift and is ready to clock out for the day. She is still at the patient's home and opens the Mobile App.

Steps:

1. Caregivers should open the **HHAX Mobile App** > **Log In** > Today's schedule
2. **Tap** the scheduled visit, then **select** the **Clock Out**.
3. **Confirm** GPS location, and **tap** continue
4. Congratulations you are clocked out!



How to Clock In and Out for a Scheduled Visit (HHAEExchange App)

This video uses the Standard System Terminology
*Your state or payer may utilize different terminology in the platform



Performing EVV: Unscheduled Visit



Scenario: Caregiver Barbara has agreed to see this patient at 3pm with no schedule. She can use the Mobile App to create an unscheduled visit.

Steps:

- 1. Caregivers should open the HHAX Mobile App > Log In.**
- 2. Tap Unscheduled Visit, then select the Patient.**
- 3. Confirm GPS location, and tap Continue.**
- 4. Congratulations you are clocked in!**

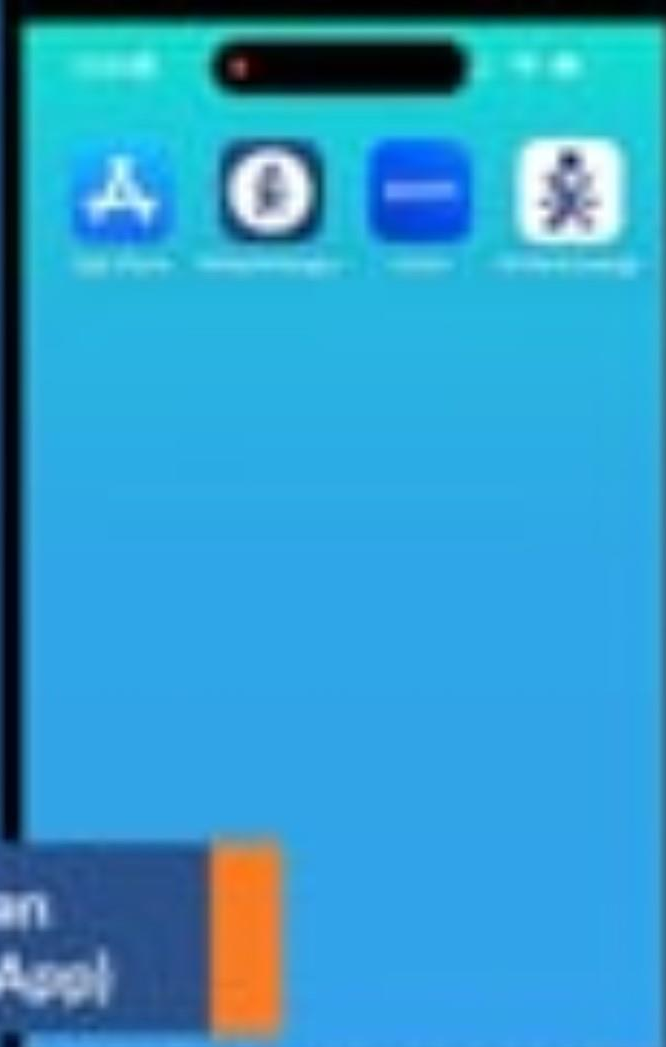
Performing EVV: Unscheduled Visit



Scenario: Caregiver Barbara has seen this patient until 4pm and is at the end of her unscheduled shift. She will use the Mobile App to clock out for the day.

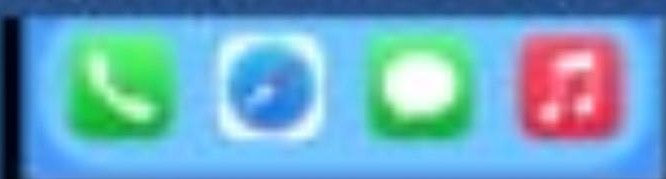
Steps:

- 1. Caregivers should open the HHAX Mobile App > Log In**
- 2. Tap the active visit and select Continue Visit.**
- 3. Select EVV Clock Out.**
- 4. Confirm GPS coordinates**
- 5. Congratulations you are clocked out!**



How to Clock In and Clock Out for an
Unscheduled Visit (HHAXchange App)

This video uses the Standard System Terminology
*Your state or payer may utilize different terminology in the platform



Performing EVV: Offline Mode



Scenario: Caregiver Barbara must clock in for her shift and has poor connectivity. With Offline Mode she can perform EVV and it will sync to the visits when she is connected to Data.

Steps:

- 1. Offline Mode will be enabled automatically with no data.**
- 2. Log in > Poor Connectivity> Offline Mode > Perform EVV**
- 3. Providers will not be able to reset passwords and other functions in offline mode.**



Performing EVV

Offline Mode



11:09

90

HHAeXchange

PE Home and Healthcare Demo (DO NOT USE) (PE Home and Healthcare Demo)

Schedule

Today's Schedule

1

Visits scheduled for 05/06/2025

Unscheduled Visit

Visits not scheduled on Calendar

Visits

List of scheduled and confirmed visits.

Patients

List of serviced patients

Communications Center

Messages

Agency Messages

Other

My Availability

Offline Mode Active

We have noticed that you have a weak or no signal coverage, all activity will be saved and uploaded when your signal strength better.



Offline Mode

- [Knowledge Base: Offline Mode](#)



USING THE MOBILE APP IN OFFLINE MODE

Stay on track even with no signal - here's what you can do in Offline Mode.



PREPARE BEFORE YOU LOSE SIGNAL

1



Log in to the mobile app while you still have internet so it can load your visit and patient information.

2



Once you're in an area with poor signal, turn off your cellular data to enable offline mode.

3



Log in to the mobile app. Make sure you see the "Offline Mode Active" message.



All other app features are unavailable until you're back online.



ONCE LOGGED IN, AVAILABLE ACTIONS FROM TODAY'S SCHEDULE OR UNSCHEDULED VISIT SCREEN

1



Complete your visit tasks as usual (clock in/out, and/or enter duties).

2



The mobile app will upload everything once you're back online.



GET BACK ONLINE TO SYNC YOUR WORK

1



Turn on your cellular network.

2



Open the mobile app and log in.

3



Offline activity will upload automatically once you're back online.



Your clock-ins/outs and duties are automatically saved and synced!



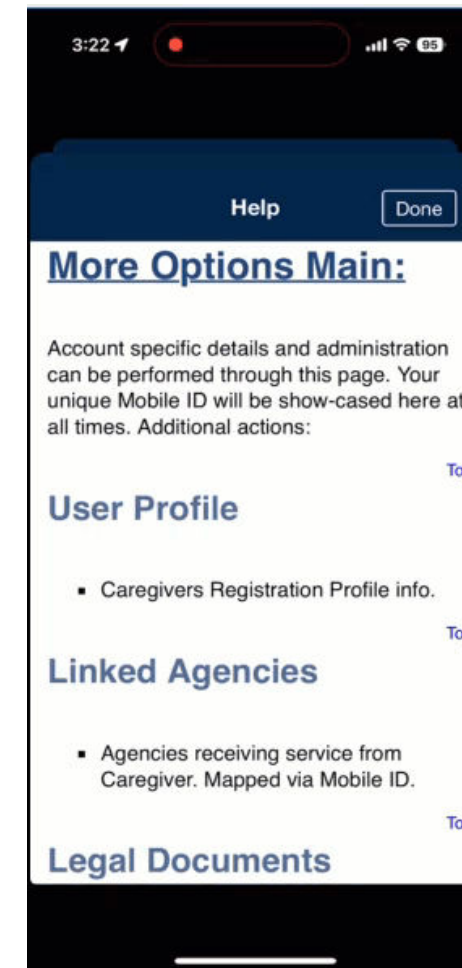
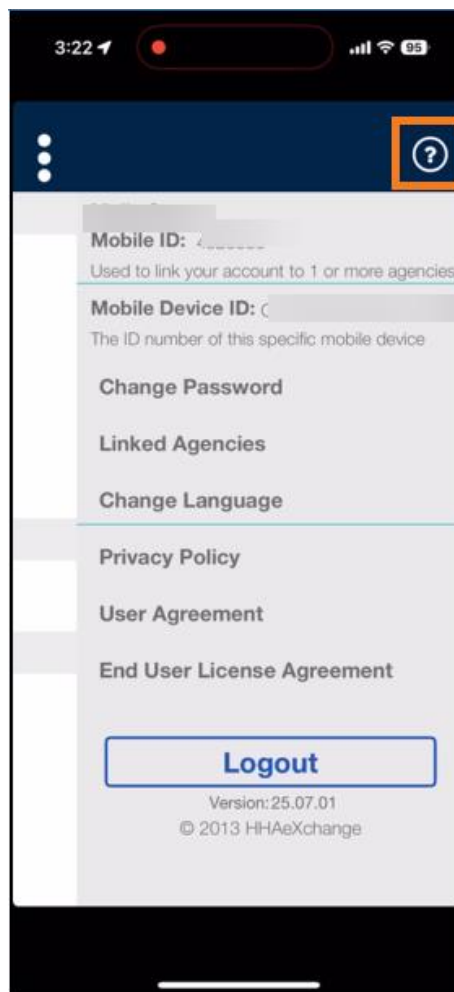
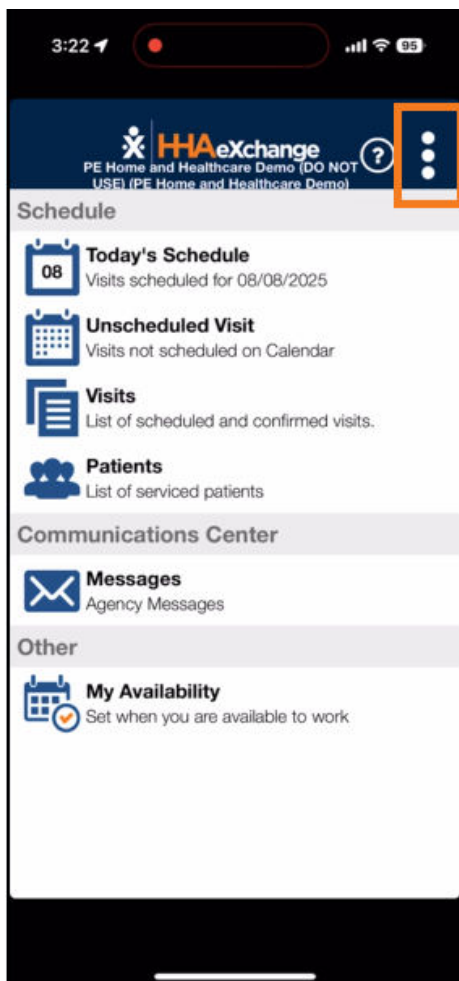
Need more help? Watch this video for more information on this feature!



Troubleshooting



Caregivers can troubleshoot for mobile app with Help feature.

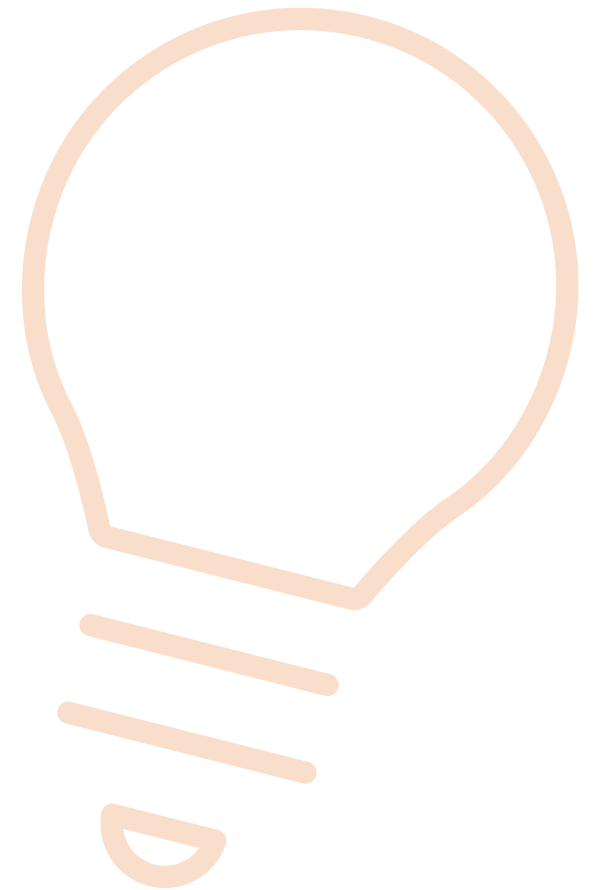


Knowledge Check



What is the main reason Barbara must clock out through the mobile app immediately after completing her visit?

- A) To notify the agency she is leaving the patient's home
- B) To avoid being locked out of the app
- C) To ensure accurate EVV records for compliance
- D) To track how long the app was open





Key Takeaways



Key takeaways



- When scheduling, make sure the service code is correct to utilize the correct authorization.
- When creating a master week, you must update the schedule to the patient calendar to initiate the roll over.
- When enabling caregiver access to mobile application, make sure the caregiver has provided the mobile ID.
- The admin should add the mobile id to the caregiver/mobile portal ID field.
- Caregivers should make sure they are in range before completing the EVV clock in or out.



Resources



Resources

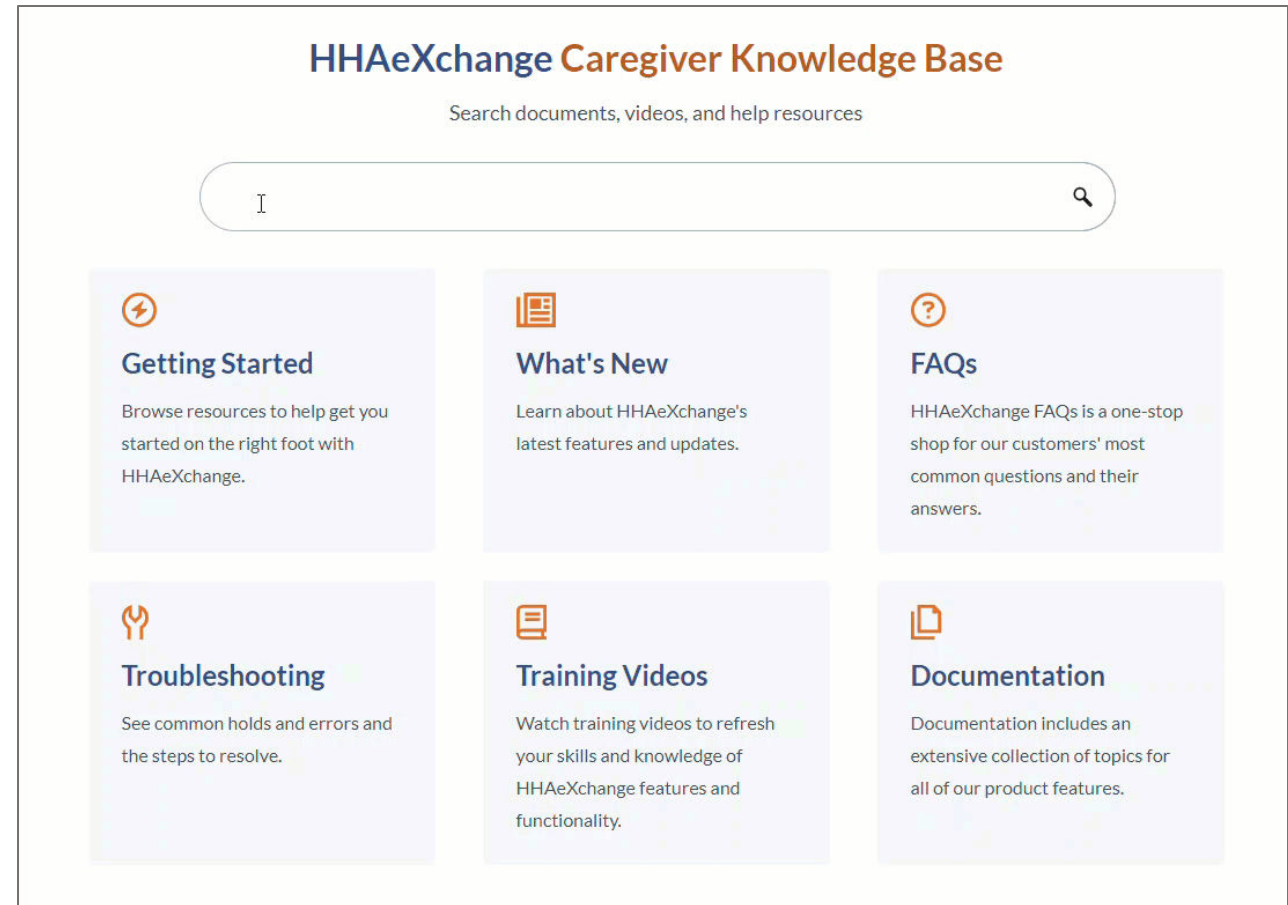


- [How to Create an Individual Visit](#)
- [How to Create a Master Week](#)
- [Link Mobile ID with caregiver profile](#)
- [Offline mode mobile app](#)

Caregiver Training Resources

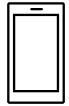


- [Caregiver Knowledge Base](#)
 - Documentation
 - Videos
 - FAQs



The screenshot displays the HHAExchange Caregiver Knowledge Base interface. At the top, the title "HHAExchange Caregiver Knowledge Base" is shown in a blue and orange font. Below the title is a search bar with the placeholder text "Search documents, videos, and help resources". The main content area is organized into a 2x3 grid of light purple cards, each with an orange icon and a title. The cards are: "Getting Started" (lightning bolt icon) with the description "Browse resources to help get you started on the right foot with HHAExchange."; "What's New" (document icon) with the description "Learn about HHAExchange's latest features and updates."; "FAQs" (question mark icon) with the description "HHAExchange FAQs is a one-stop shop for our customers' most common questions and their answers."; "Troubleshooting" (wrench icon) with the description "See common holds and errors and the steps to resolve."; "Training Videos" (video camera icon) with the description "Watch training videos to refresh your skills and knowledge of HHAExchange features and functionality."; and "Documentation" (document icon) with the description "Documentation includes an extensive collection of topics for all of our product features." Each card also features a row of small, colorful circular icons at the bottom right.

> Caregiver Training Resources



- [Mobile Resources](#)
 - [Access the HHAeXchange Mobile App](#)
 - [Training videos](#)

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 lists various sections: 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 instructional diagrams. Each diagram shows a four-step process for logging into the mobile app, with steps involving opening the app, selecting 'Log In', entering credentials, and tapping the login button. Below these diagrams, a note states: 'Note: Some features may not be available in your portal. Features depend on role, permissions, and portal type.' At the bottom of the page, there are links for 'Mobile App Caregiver Overview' and 'Mobile App Caregiver Classic Guide' (which includes a PDF icon).



Next steps



Next steps: Register & Attend Milestone 3 Session



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

Scan here to Register!





Provider Resources



HHAeXchange State Info Hub

[Humana Healthy Horizons in Virginia
Information Center | HHAeXchange](#)

[How to Use the Customer Portal](#)



HHAeXchange Knowledge Base

[https://knowledge.hhaexchange.com/
/enterprise/Content/Home/Home-
N.htm](https://knowledge.hhaexchange.com/enterprise/Content/Home/Home-N.htm)



Humana Healthy Horizons Provider Relations Email

[VAMedicaidProviderRelations@hu
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Questions?



HHAeXchange State Info Hub

THANKS FOR ATTENDING!



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