

Our Webinar Will Begin Shortly

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My speaking language: English ›

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Q&A



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Record



More



Meet the Presenter



Teavy Leonardson



- Role: Senior Training Specialist
- Tenure at HHAeXchange: 3 years
- Areas of Expertise: Implementation & Training
- Fun Fact: *My nickname in my team is ChatGPTeavy since I have been asked by clients if I am an AI bot.*

Humana Health Horizons of Virginia Milestone 5:

Reporting & Compliance Monitoring

October 2025

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Humana Healthy Horizons: 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



Accessing Previous Milestone Training Resources



HHAeXchange State Info Hub

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

For the EDI team to receive your file, please go to:
hhaexchange.com/supportrequest

How to Use the Customer Portal



Milestone 5: Reporting & Compliance Monitoring

Overview



This training introduces reporting and compliance tools in HHAeXchange. You'll learn how to track EVV performance, identify trends that affect billing, and correct claims for successful resubmission. The goal is to help agencies keep operations compliant and efficient.

Who should take this training?

- Agency admins and billing staff
- Managers responsible for EVV compliance
- Staff who run reports or review compliance scores

Objectives of Today's Training

You will be able to:

- **Define** standard reporting and invoice maintenance
- **Navigate** reporting tools and invoice processes
- **Run** compliance reports and perform invoice corrections



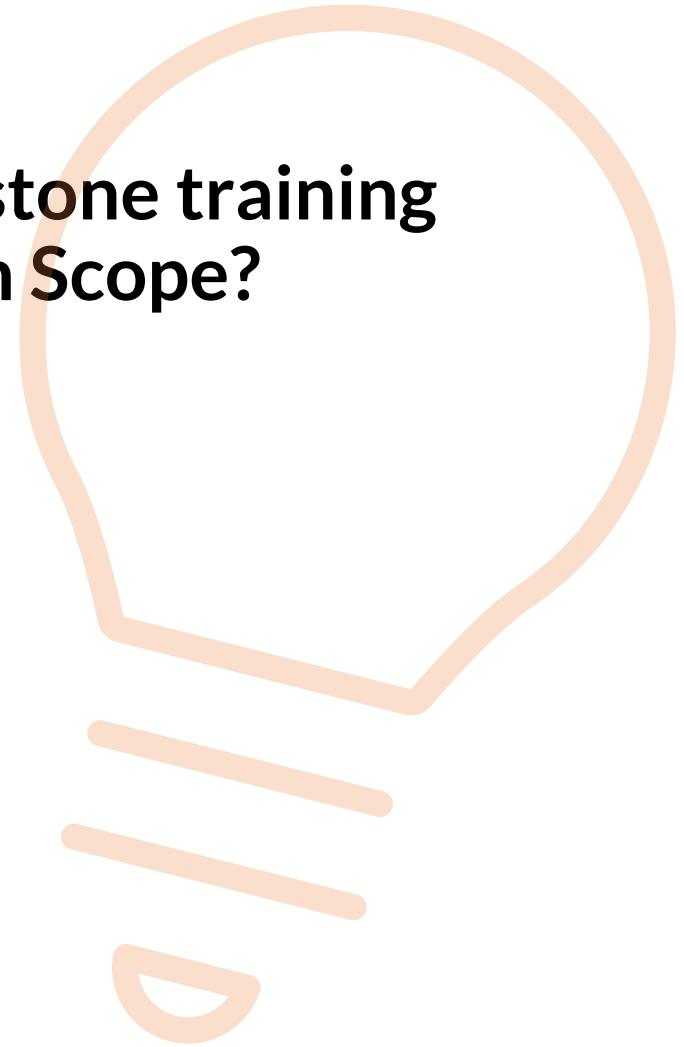
Knowledge Checks

You'll see these throughout the presentation!



Where in HHAeXchange, can you find all milestone training videos/slide decks & updates to the Services in Scope?

- A. HHAeXchange State Info Hub
- B. Julie - HHAeXchange's Virtual Assistant
- C. DMAS Support Center
- D. HHAeXchange University



Knowledge Checks

You'll see these throughout the presentation!



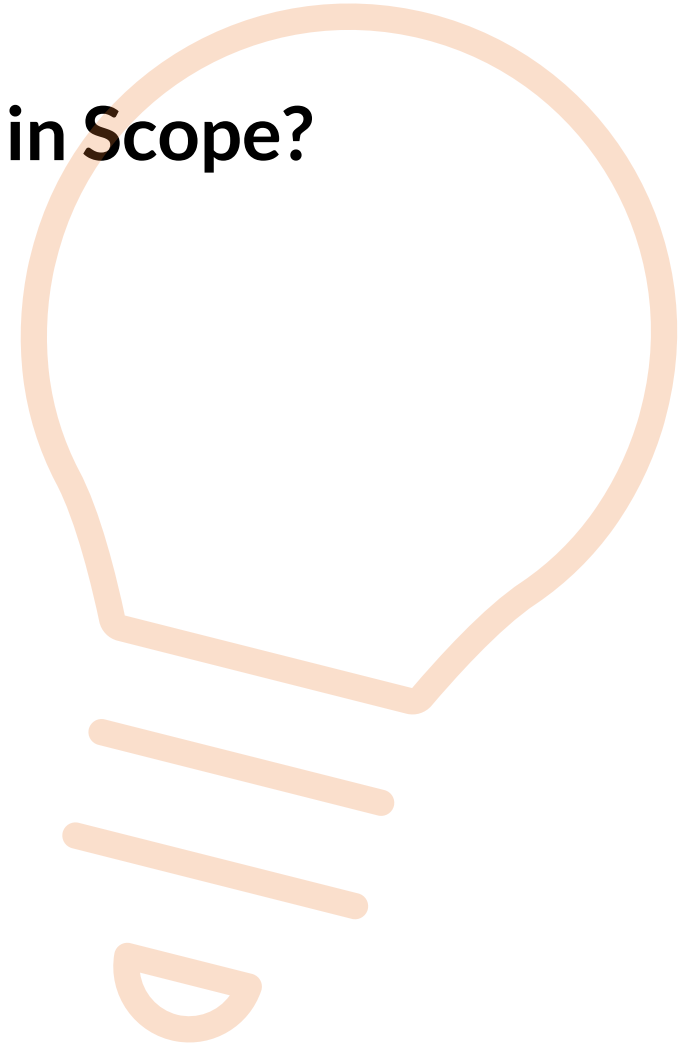
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Milestone 5: Agenda



EVV Overview



Invoice Maintenance



Correcting Invoices



Invoicing



Billing Review & Electronic Billing



Reports



Key Takeaways



Next steps



Resources



Questions



EVV Overview

> 6 Elements of a Cures Compliant Visit



Who

Patient



Who

Caregiver



What

Type of
Service



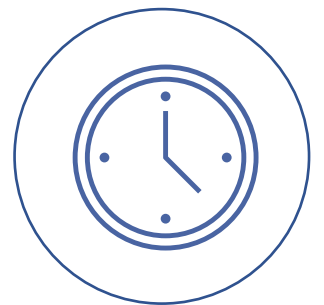
Where

Location
of Service



When

Date of
Service



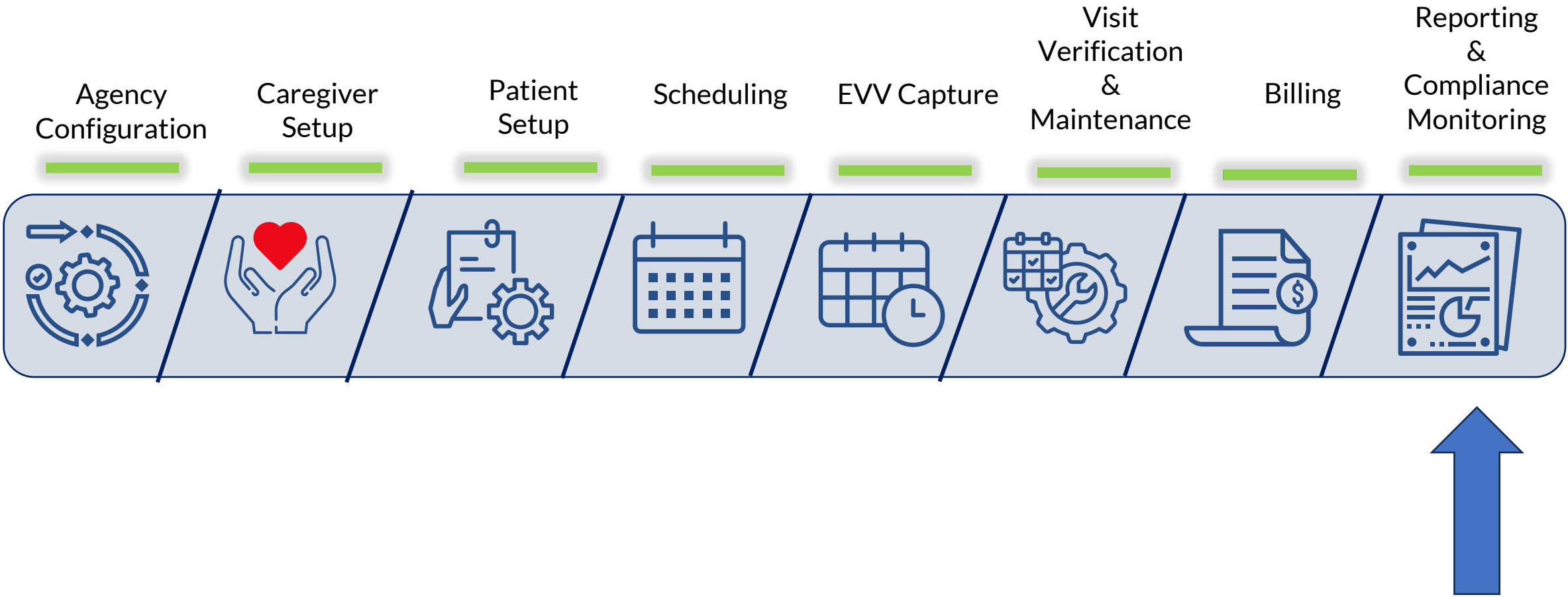
When

Time of
Service



EVV Tracker

Schedule and Visit Capture training



HHAEExchange 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		



Invoice Maintenance



Correcting claims

Denied Claims



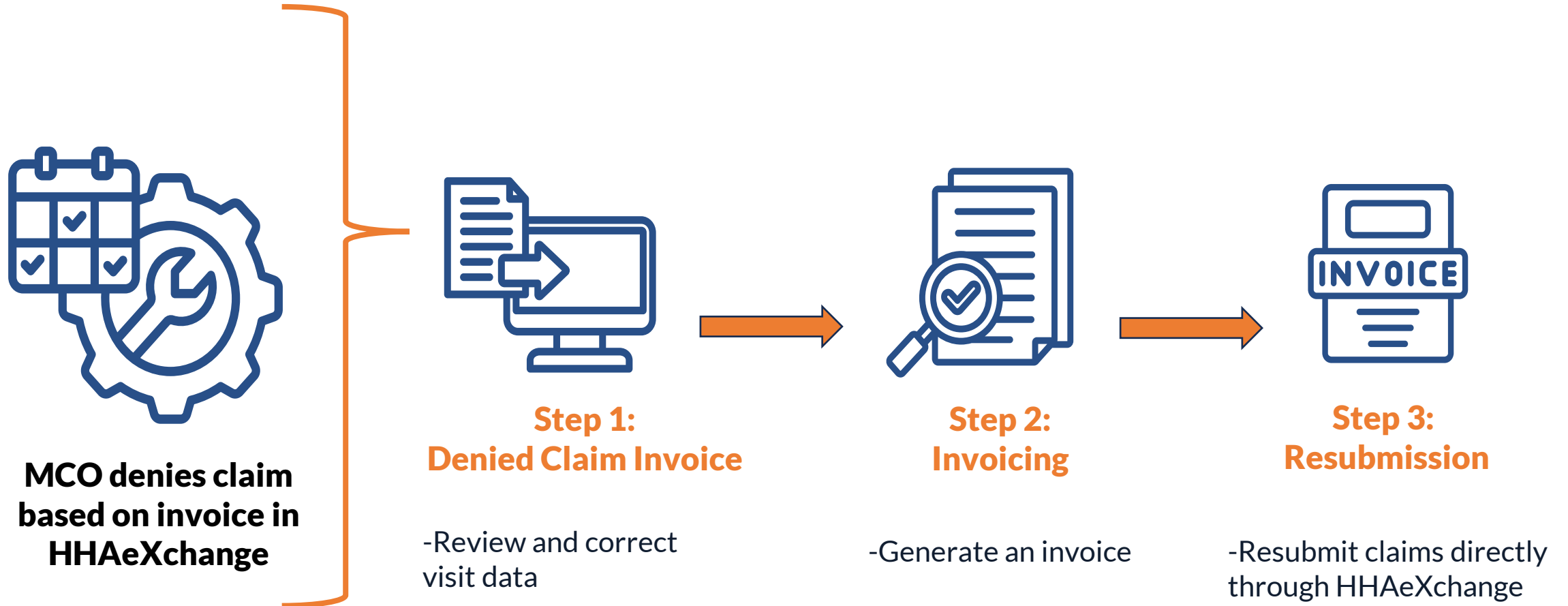
If your claim is denied by the MCO after being invoiced in HHAeXchange:

- Review visit **start** and **end times** to ensure accuracy.
- Verify the **service code** matches the authorization.
- Confirm the **caregiver** is correctly assigned to the visit.
- Review **diagnosis code** under the authorization.
- Update and resubmit once **corrections** are made.



Tip: Most denials are caused by visit data issues, so check these areas first before reaching out for support.

> Invoice Maintenance Workflow





Denied Claim invoice



Step 1: Denied Claim invoice

Steps: Billing > Invoice search

Purpose: Review and correct the data.

- **Review Visits** – ensure caregiver times are accurate
- **Verify Service code** - ensure the visit is using the correct service code.
- **Remove visits from invoice**



Step 2: Invoicing

Steps: Billing > New Invoice (Internal)

Purpose: Generate invoices based on billable visits.

- **Create Invoice:** Select the appropriate time period and services to create an invoice
- **Verify Invoice Details:** Review the invoice for accuracy, including service codes, and amounts

> Resubmission



Step 3: Resubmission

Steps: Billing Claims with MCO

Purpose: Resubmit claims through HHAeXchange.

- After visits have been corrected and invoiced, claims should be resubmitted directly to HHAeXchange.
- The MCO will verify claims based on invoiced claims in HHAeXchange.



Correcting Invoices



Correcting Invoices

Removing visits from invoice



Scenario: The biller has received a denied claim based on a mismatched invoice in HHAeXchange. The biller will need to remove the visit to correct it and rebill.

Steps:

1. Navigate to **Billing > Invoice search > Batch search**
2. Click **Search**.
3. Select **Invoice batch** and look for the invoice.
4. Find the visit and go to the **Delete** icon. 
5. Select the **Delete visit**.
6. Select **Reason for Deletion** and select **Delete**.





Correcting Invoices

Correcting Visits



Scenario: The biller has received a denied claim based on a mismatched invoice in HHAeXchange. Now that the visit has been removed from the invoice. The biller will go and correct the visit.

Steps:

1. Navigate to **Patient > Patient search**
2. Click **Search**.
3. Select **Patient**
4. Find and select the visit that needs to be corrected.
5. If applicable, update the **Caregiver, Confirmed times, Diagnosis Code, and or Service code**.
6. Save the visit.

Knowledge Checks

Correcting visits



After deleting a mismatched visit from an invoice, what should the biller do **next** to correct the visit in HHAeXchange?

- A. Create a new visit from the billing tab > Update Caregiver > Save
- B. Go to Patient calendar > Enter the Visit > Make corrections > Save
- C. Go to Visit Maintenance > Click on Prebilling > Delete Visit > Save
- D. Edit the visit from the Caregiver's profile > Enter Invoice Note > Save

Knowledge Checks

Correcting visits



After deleting a mismatched visit from an invoice, what should the biller do **next** to correct the visit in HHAeXchange?

A. Create a new visit from the billing tab > Update Caregiver > Save

B. Go to Patient calendar > Enter the Visit > Make corrections > Save

C. Go to Visit Maintenance > Click on Prebilling > Delete Visit > Save

D. Edit the visit from the Caregiver's profile > Enter Invoice Note > Save



Invoicing



Billing

Generate Invoice



Scenario: The biller has corrected the visits and now is ready to re-invoice them.

Steps:

1. Navigate to **Billing > New Invoice Internal**
2. Add the Date range, offices, and optionally any other filters.
3. Click **Search**.
4. Review billable visits, also make sure that the visit has an amount.
5. Select the billable visits to add to the invoice or add all to batch.
6. Click **Select Generate Invoice** to complete the batch.



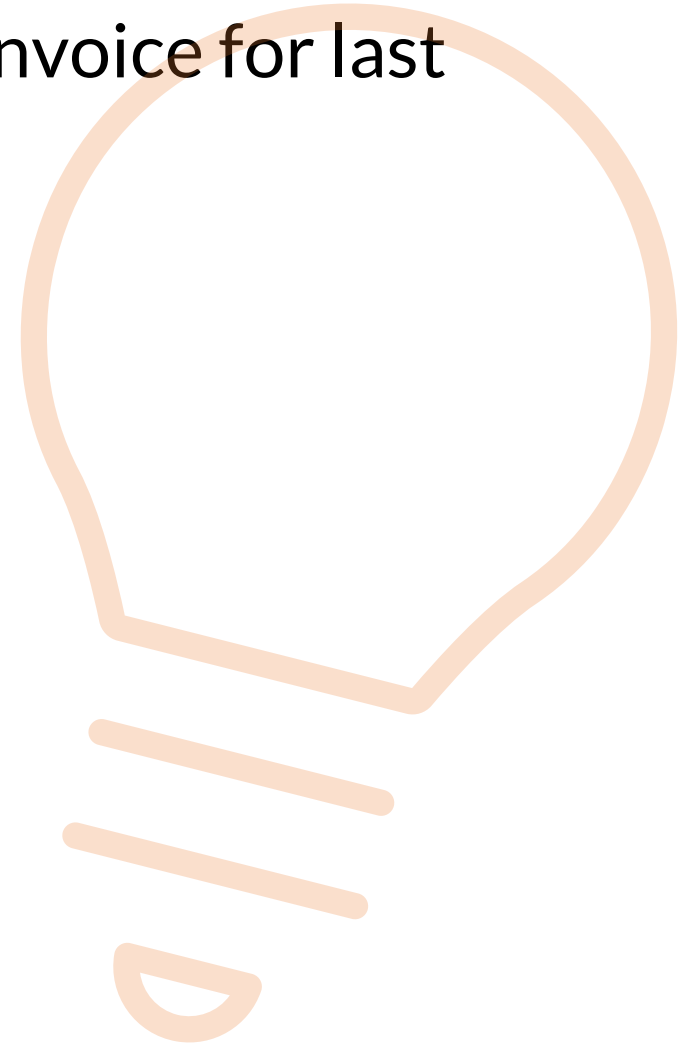
Knowledge Check

Generate Invoice



What is the correct **first step** to generate an internal invoice for last week's billable visits?

- A. Click "Select Generate Invoice"
- B. Review billable visits and amounts
- C. Navigate to Billing > New Invoice Internal
- D. Add the date range and filters



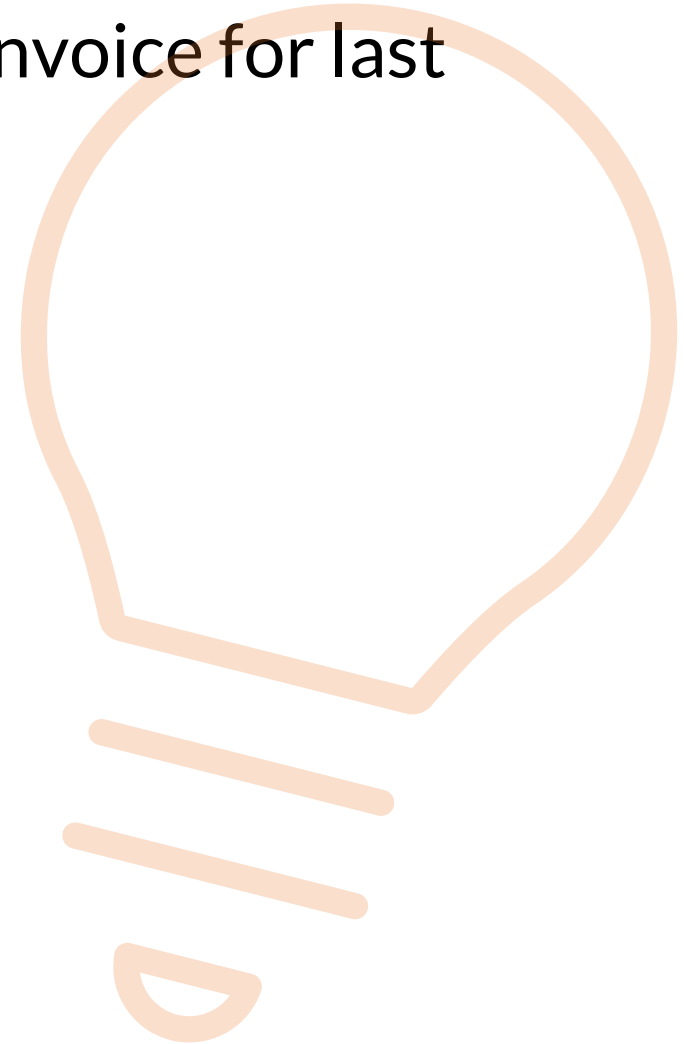
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What is the correct **first step** to generate an internal invoice for last week's billable visits?

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- B. Review billable visits and amounts
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- D. Add the date range and filters





Billing Review & Electronic Billing

Steps: Billing > Billing Review



Any visits in Billing Review CANNOT be electronically submitted until issues are corrected

Most Common Billing Review Problems:

- **Pending Billing of Additional Shifts on Same Day** – Only one visit has been invoiced on a day with multiple visits

Check out the HHAeXchange Knowledge Base for step-by-step videos on how to resolve Billing Review problems <https://knowledge.hhaexchange.com/enterprise/Content/Training/Getting-Started-T.htm>



Electronic Billing

Generate E-Billing Batch



Scenario: The biller has re-invoiced the visit and is now ready to generate e-billing batch for resubmission.

Steps:

1. Navigate to **Billing > Electronic Billing > E-Submission Batches**
2. Select "**Add Original Claims**"
3. Select **MCO** and **Add Claims** option.
4. Add applicable filters and click **Search**.
5. Select Visits to resubmit and click **Add**.
6. Select edit option to update submission type (Adjustment and add **TRN Number**)
7. Select "**Save Batch and Send**" option.



Reports



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 (New) 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%

Other Compliance Reports



The following reports can be found under **Report > EVV Compliance Reports**.

Report Name	Function
EVV Compliance Daily Summary Report	Daily compliance percentage per contract
EVV Compliance Detail Report	Compliance exception and reasons per day, per patient
EVV Compliance Exception Reason Usage Report	Compliance exception reasons and corresponding percentages per contract

Scenario: The admin wants to review visit information for the past month. He can use the visit report to review visit information.

Steps:

1. Navigate to **Report > Visit > Visit Report**.
2. You can select to search by **Office, MCO, Visit date range**.
3. Optionally you can add the additional filters.
4. Select **Generate report**.



A	C	D	E	G	H	I	J	K	L	N	O	P	Q	R	
HHAeXchange														Visit Report	Page 1 of 2
														Report Date: 10/02/2025 03:33 PM	
Office(s): UMA health care training				MCO: All				Caregiver: All							
Admission ID: All				Member: All				Discipline: All							
From Date: 9/1/2025		HHMM:		To Date: 10/1/2025		HHMM:		County(ies): All							
Visit Type: All				Type: All				Hold Visit for Billing: All							
Coordinator: All				Timesheet Required: All				Include Bill: All							
Invoice Number:				Invoice From Date:				Invoice To Date:							
Caregiver Team(s): All				Caregiver Location(s): All				Caregiver Branch(es): All							
Member Team(s): All				Member Location(s): All				Member Branch(es): All							
Schedule Type(s): All															
Note: Display the visit details for a specified visit or invoice date range. This report may be run based on a number of specific visit, Caregiver and/or Member attributes.										TS Values: Y/Y - Timesheet Required and Approved Y/N - Timesheet Required Not Approved N/A - Timesheet Not Required					

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
Sr #	Member (Admission ID)	Caregiver (Code)	Visit Date	Scheduled	Visit Time	Duration	MCO	Service Code	Payrate Code	Pay Rate	TS	Visit Created Date	Visit Last Modified Date	Missed Visit
1	Taylor William (434-900054)	Temp Temp (1000)	10/1/2025	2200-0000			Life Care Demo Payer (434)	T1019:U1	Non Payable	\$0.00	N/A	10/01/2025	10/01/2025	No
2	Kipper John (434-900055)	Test Teavy (434-1116)	10/1/2025	1730-2030			Life Care Demo Payer (434)	T1019	Non-Payable	\$0.00	N/A	10/01/2025	10/01/2025	No
3	Hubbs Nick (434-900185)	Test Teavy (434-1116)	10/1/2025	0700-1100			Life Care Demo Payer (434)	HHA1	Non-Payable	\$0.00	N/A	10/01/2025	10/01/2025	No
4	Hubbs Nick (434-900185)	Temp Temp (1000)	10/1/2025	1200-1600			Life Care Demo Payer (434)	HHA1	Non Payable	\$0.00	N/A	10/01/2025	10/01/2025	No
Total Hrs :				13:00		00:00								

Scenario: The biller has finished all his claims and would like to pull a report that displays invoice batches.

Steps:

1. Navigate to **Report > Billing > Invoicing > Billing Report**.
2. You can select to search by **Office, Visit date range, MCO**
3. Optionally add the batch number or just select **Generate Report**.
4. Select the format and it will be generated.



Reports

Billing Report



Office(s) :	Visit From Date:	Visit To Date:
Contract(s): All	Caregiver: All	Patient: All
Batch From Date:	Batch To Date:	Batch Number: All
Group By: Patient	Include Summary by Service Code: No	
Patient Team(s): All	Patient Location(s): All	Patient Branch(es): All

Note: S(Supply), M(Mileage), E(Expense)

Contract	Patient	Patient ID	Admission ID	Invoice Number	Caregiver	Service Code	Visit Date	Schedule	Visit	Billed Units	Billed Amt.
Patient : Patient Patient 123456789											
Blue Cross of Florida	Patient Patient		DNT-900001	600002	Caregiver	HHA	09/04/2023	0900-2100	0900-2100	0	\$420.00
Blue Cross of Florida	Patient Patient		DNT-900001	600002	Caregiver	HHA	09/05/2023	0900-2100	0900-2100	0	\$420.00
Blue Cross of Florida	Patient Patient		DNT-900001	600002	Caregiver	HHA	09/06/2023	0900-2100	0900-2100	0	\$420.00
Blue Cross of Florida	Patient Patient		DNT-900001	600002	Caregiver	HHA	09/07/2023	0900-2100	0900-2100	0	\$420.00
Blue Cross of Florida	Patient Patient		DNT-900001	600002	Caregiver	HHA	09/08/2023	0900-2100	0900-2100	0	\$420.00
Blue Cross of Florida	Patient Patient		DNT-900001	600002	Caregiver	HHA	09/11/2023	0900-2100	0900-2100	0	\$420.00
Blue Cross of Florida	Patient Patient		DNT-900001	600002	Caregiver	HHA	09/12/2023	0900-2100	0900-1200	0	\$105.00
Blue Cross of Florida	Patient Patient		DNT-900001	600002	Caregiver	HHA	09/13/2023	0900-2100	0900-2100	0	\$420.00
Blue Cross of Florida	Patient Patient		DNT-900001	600002	Caregiver	HHA	09/14/2023	0900-2100	0900-2100	0	\$420.00
		Hourly		Live-in		Visits		Supply/Expense/		Total	
		Scheduled	Billed	Scheduled	Billed	Scheduled	Billed	Total Units	Billed	Scheduled/U	Billed
		108:00	0.00 /	0	0.00 /	0	0.00 /	0	0.00 /	108:00 /	0.00 /
Patient : Patient Patient 12354684											
Genworth LTC	Patient Patient		DNT-900003	600003	Caregiver	HHA	09/05/2023	1000-1600	1000-1600	0	\$210.00
Genworth LTC	Patient Patient		DNT-900003	600003	Caregiver	HHA	09/12/2023	1000-1600	1000-1600	0	\$210.00
		Hourly		Live-in		Visits		Supply/Expense/		Total	
		Scheduled	Billed	Scheduled	Billed	Scheduled	Billed	Total Units	Billed	Scheduled/U	Billed
		12:00	0.00 /	0	0.00 /	0	0.00 /	0	0.00 /	12:00 / 0.00	0.00 /
Patient : Patient Patient 35161651											
John Hancock	Patient Patient		DNT-900002	600004	Caregiver	HHA	09/03/2023	0930-1430	0930-1430	0	\$175.00
John Hancock	Patient Patient		DNT-900002	600004	Caregiver	HHA	09/04/2023	0930-1430	0930-1430	0	\$175.00
John Hancock	Patient Patient		DNT-900002	600004	Caregiver	HHA	09/05/2023	0930-1430	0930-1430	0	\$175.00

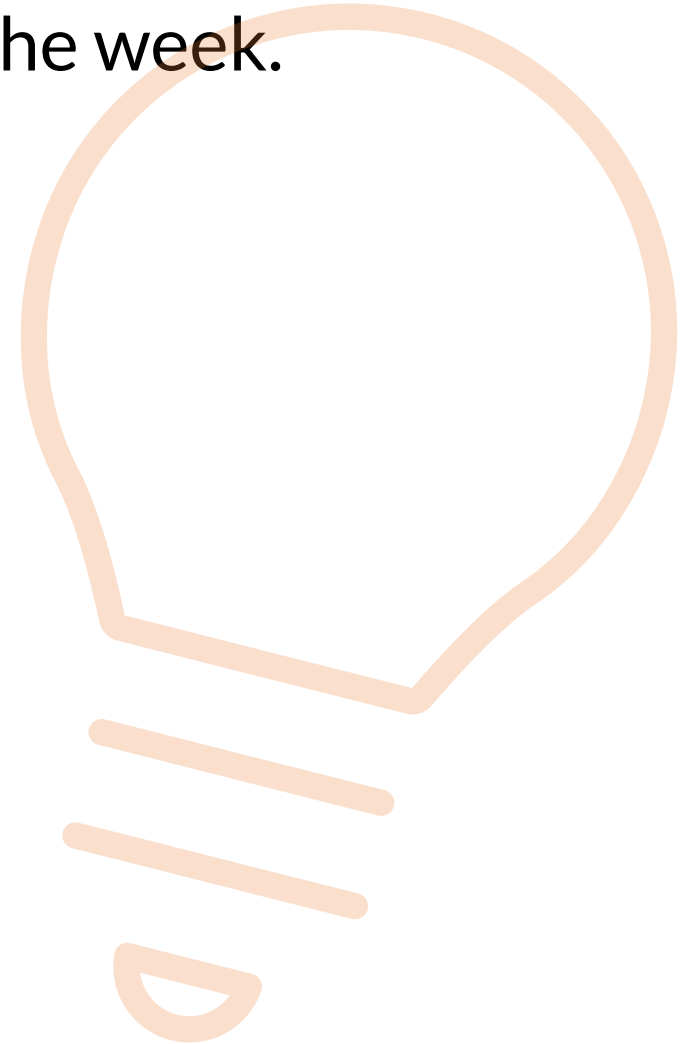
Knowledge Checks

Reports



You would like to review Barbara's EVV progress for the week.
What report should you run?

- A. Visit History Report
- B. Timesheet by Caregiver Report
- C. EVV Compliance by Caregiver Report
- D. Invoice Batch Report



Knowledge Checks

Reports



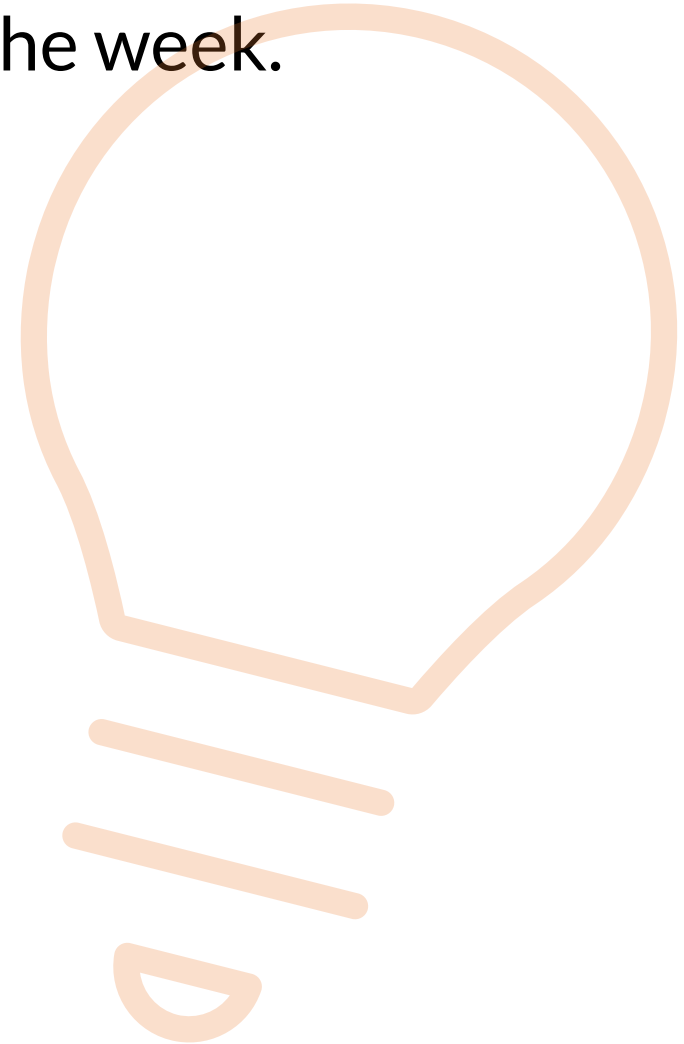
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What report should you run?

A. Visit History Report

B. Timesheet by Caregiver Report

C. EVV Compliance by Caregiver Report

D. Invoice Batch Report





Key Takeaways



Key Takeaways



- Invoices can be reviewed in Invoice search.
- Visits that need to be corrected should be removed from the invoice first.
- Once the visit has been corrected, it can be invoiced again.
- Visit report can be used to review visits.
- Billing reports can be used to review billed invoices.
- For Alt-EVV/EDI Providers, Registration does not equal integration. You must register to have a portal, but you also need to submit an EDI ticket through HHAeXchange Support to officially start the setup & integration process.
- Ensure you check with Humana Healthy Horizons of Virginia or the HHAeXchange State Info Hub for the most recent updates to the service codes in scope for billing



Next steps

Next steps



- Start Billing (Generating invoices)
- Please use our resources such as the Knowledge Base to complete any missing steps.
- For the EDI team to receive your file, please go to: hhaexchange.com/supportrequest
- State Info Hub
 - [Services in Scope](#)
- EVV Compliance System Reports
 - [EVV Compliance System Reports](#)



Resources



[Invoice Search](#)

[Unbill a visit](#)

[How to Generate an Invoice Batch on Vimeo](#)

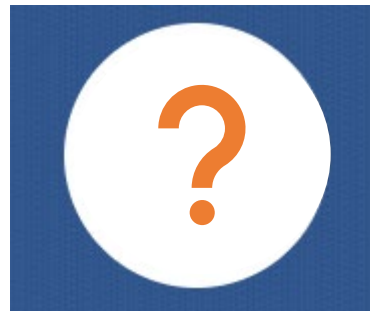


Provider Resources



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



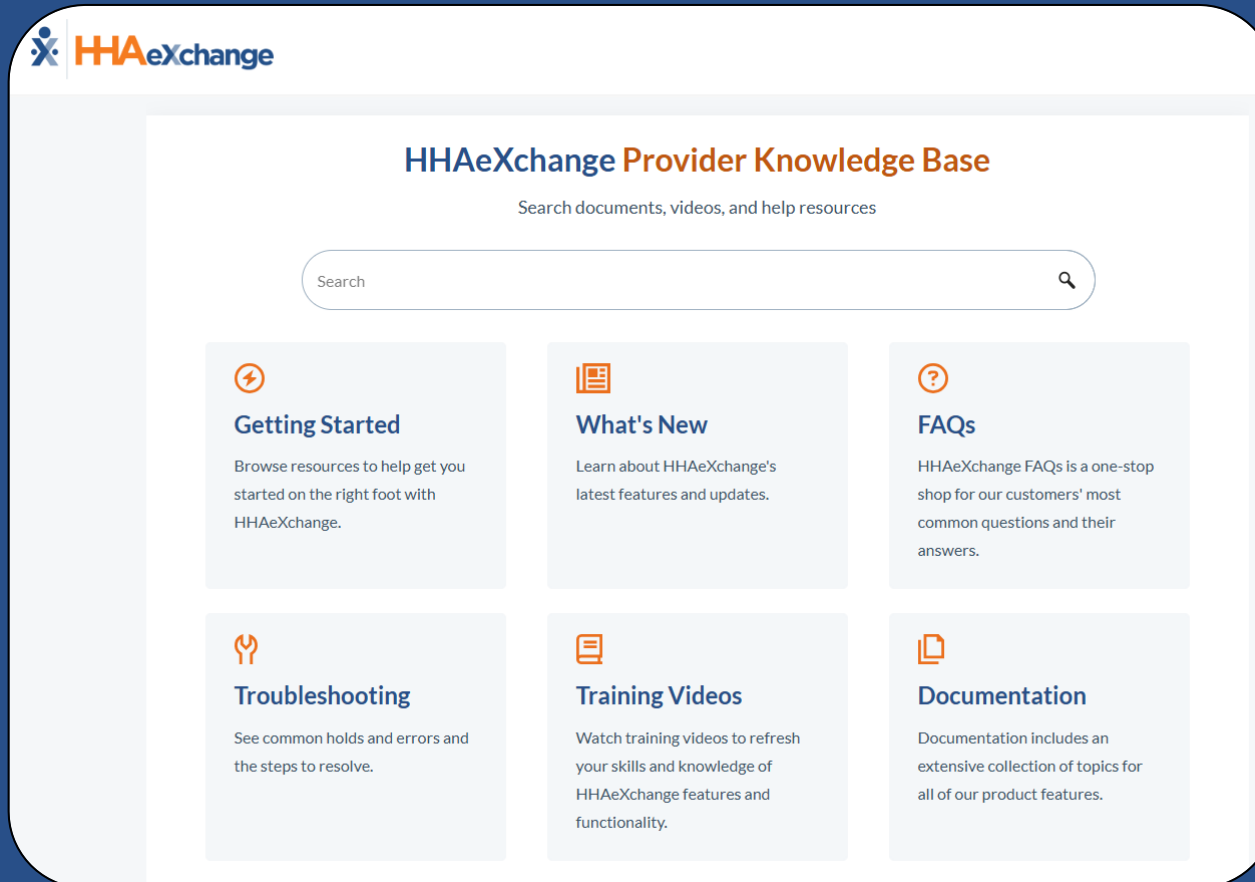
Humana Healthy Horizons Provider Relations Email

[VAMedicaidProviderRelations@hu
mana.com](mailto:VAMedicaidProviderRelations@humana.com)

[How to Use the Customer Portal](#)



HHAeXchange has a new Knowledge Base!



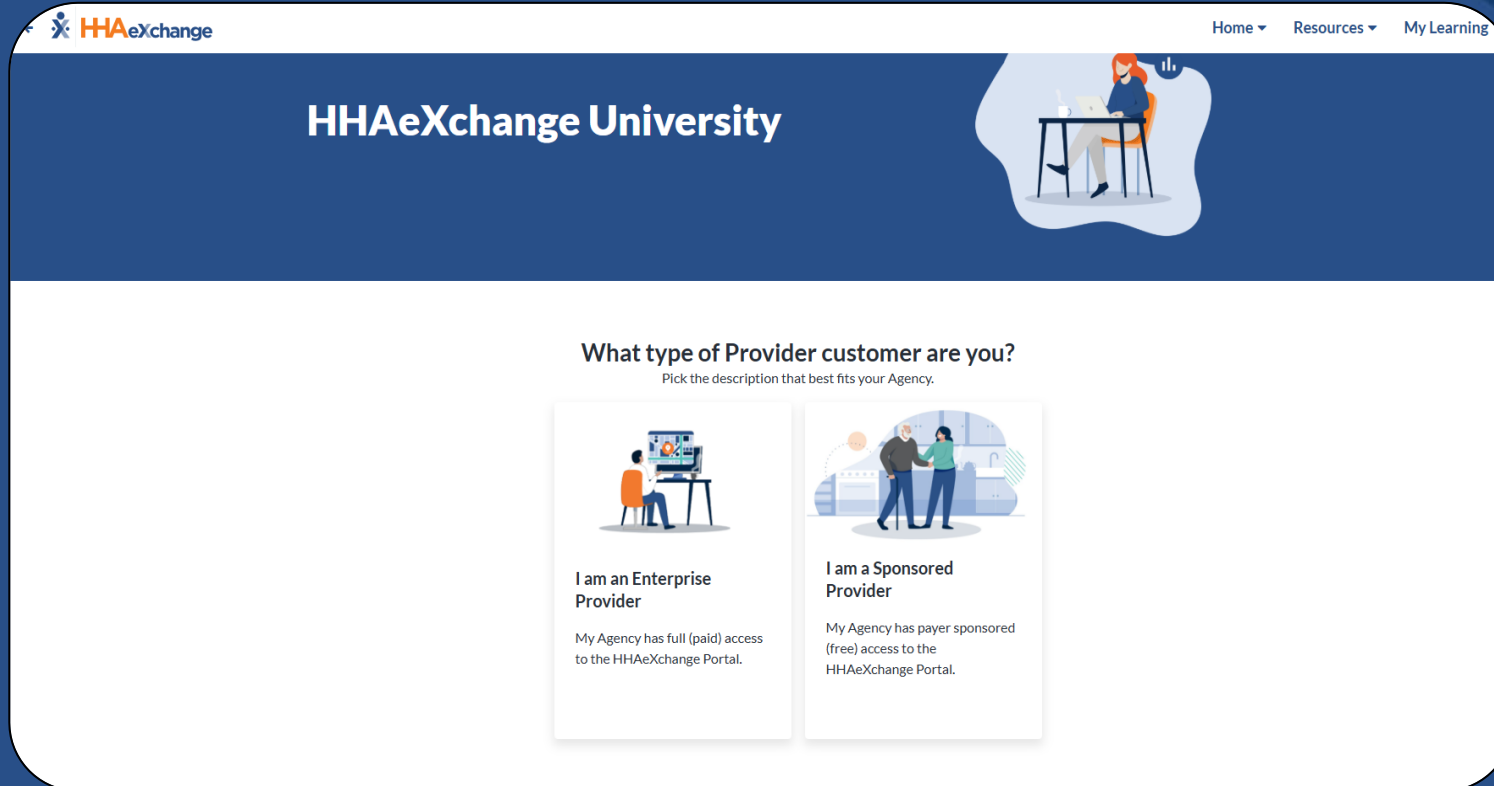
The Knowledge Base houses helpful resources to provide answers to your questions according to specific topics

- Frequently Asked Questions (FAQs)
- Training Videos
- Documentation
- What's New

Check it out using the link below:

<https://www.hhaexchange.com/knowledge-base>

New Sponsored Provider Onboarding Program Available!



HHAeXchange University is now available for State Sponsored providers to have a foundational overview of key topics such as:

- Patient & Caregiver Management
- Agency Setup
- Visit Maintenance
- Billing

Check it out using the link below:

<https://university.hhaexchange.com/>

Caree Virtual Assistant



Caree, HHAeXchange's new Virtual Assistant, provides 24/7 support to answer questions and shares Knowledge Base articles and videos for specific topics.

HomePatient▼Caregiver▼Visit▼Action▼Billing▼Report▼Admin▼

0

Hello achoo

Placements (9 Pending)EventsSystem NotificationsDirect MessagesTasksLinked 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 ^	MCO 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

[Support Center](#) | [UMA Healthcare \(PE Training Use Only\)](#) [ID# N/A] | Cloud

Enterprise 25.04.01 AWSWEB9 chrome 136 (Doc Chrome 136) 05/23/25 15:15 PM EST

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Questions?

**THANKS FOR
ATTENDING!**



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after exiting the webinar.*