

Our Webinar Will Begin Shortly

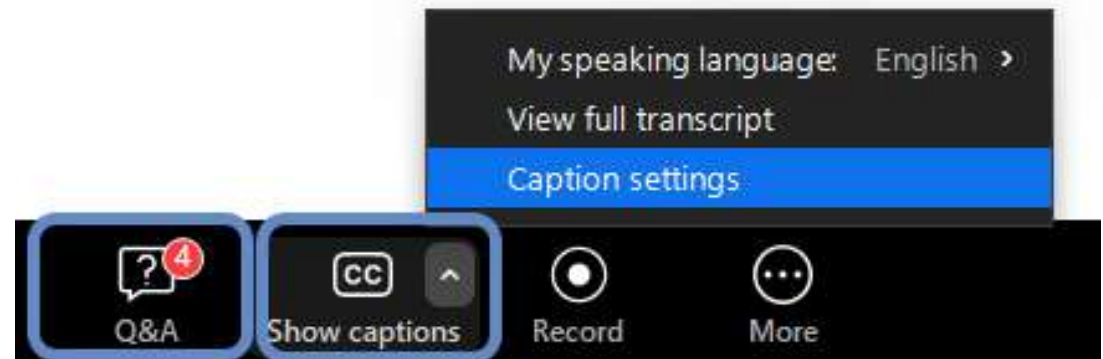
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Enabling Closed Caption

- This webinar is being recorded. We will email the recording and slides after the session.
- Your camera and mics are turned off.
- Q&A at the end. Please submit your questions in the Q&A box.
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- Please proceed by selecting the Closed Caption option at the bottom of your screen to enable feature.





IL DRS & DOA Phase 3: Scheduling & Visit Capture

February 2026

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Meet the Presenter

Shanieka Naik



- **Role:** Training Specialist
- **Tenure at HHAExchange:** 1 year
- **Areas of Expertise:** Sponsored Training
- **Fun Fact:** I am a huge foodie and experience-seeker.



Scheduling and Visit Capture

Overview



This training introduces the scheduling and visit capture features in HHAeXchange for Illinois DOA & DRS providers. 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.

- Scheduling caregiver visits (Individual & Master Week)
- EVV capture methods

Who should take this training?

- Payer Sponsored providers using EVV tools
- Agency staff responsible for scheduling, visit capture, or EVV
- Providers onboarding new coordinators or administrators

Poll: Payer Sponsored Provider



Have you completed the following?

- Completed system setup tasks
- Logged in to the HHAeXchange Portal

A. Yes

B. No

**IL DRS & DoA EVV Operations
Setup: Visit Maintenance**



Webinar Registration - Zoom
[Register Here](#)
Tuesday, March 10 @ 11:00
AM ET

Today's Objectives

You will be able to:

- **Explain** how scheduling and visit capture support accurate EVV and reduce exceptions
- **Create and manage** individual and recurring schedules that align with authorizations
- **Support** caregivers in capturing EVV using the Mobile App and IVR before their first visit
- **Apply** timing and location best practices to maintain EVV compliance and reduce manual corrections





Agenda

- EVV Overview
- Scheduling
(Single Visit vs Master Week)
- Mobile App Setup
- Visit Capture Overview
- Key Takeaways
- Resources
- Questions

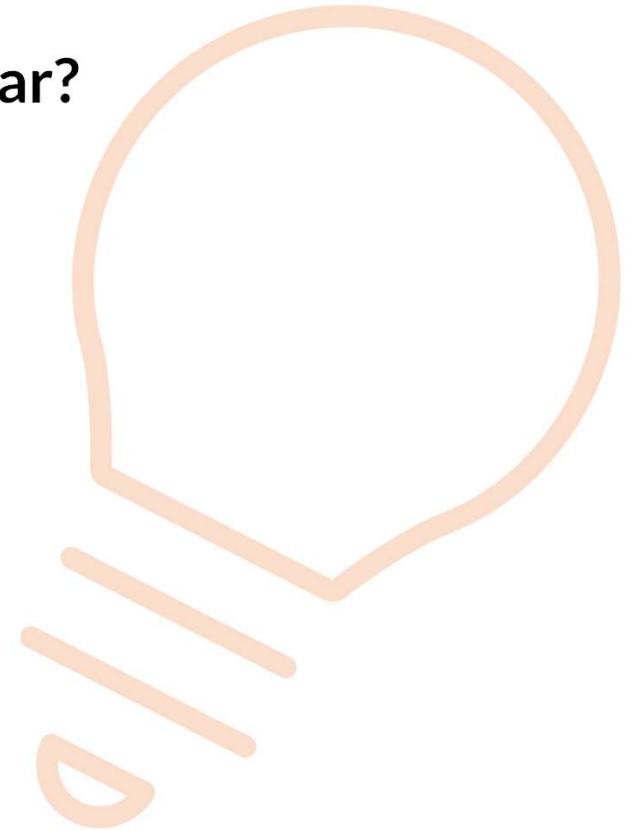
Knowledge Check

You'll see these throughout the presentation!



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

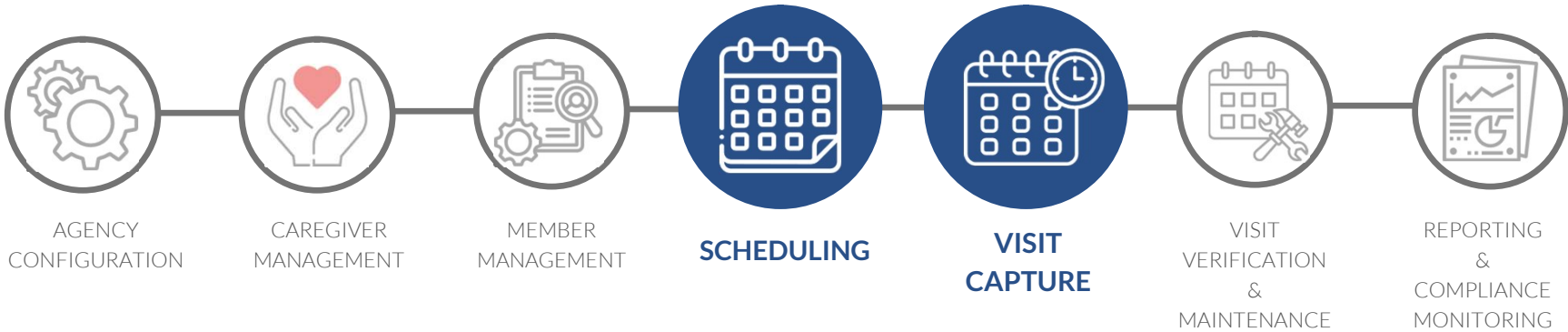
- A. Sarah
- B. Alejandra
- C. Ashley
- D. Shanieka



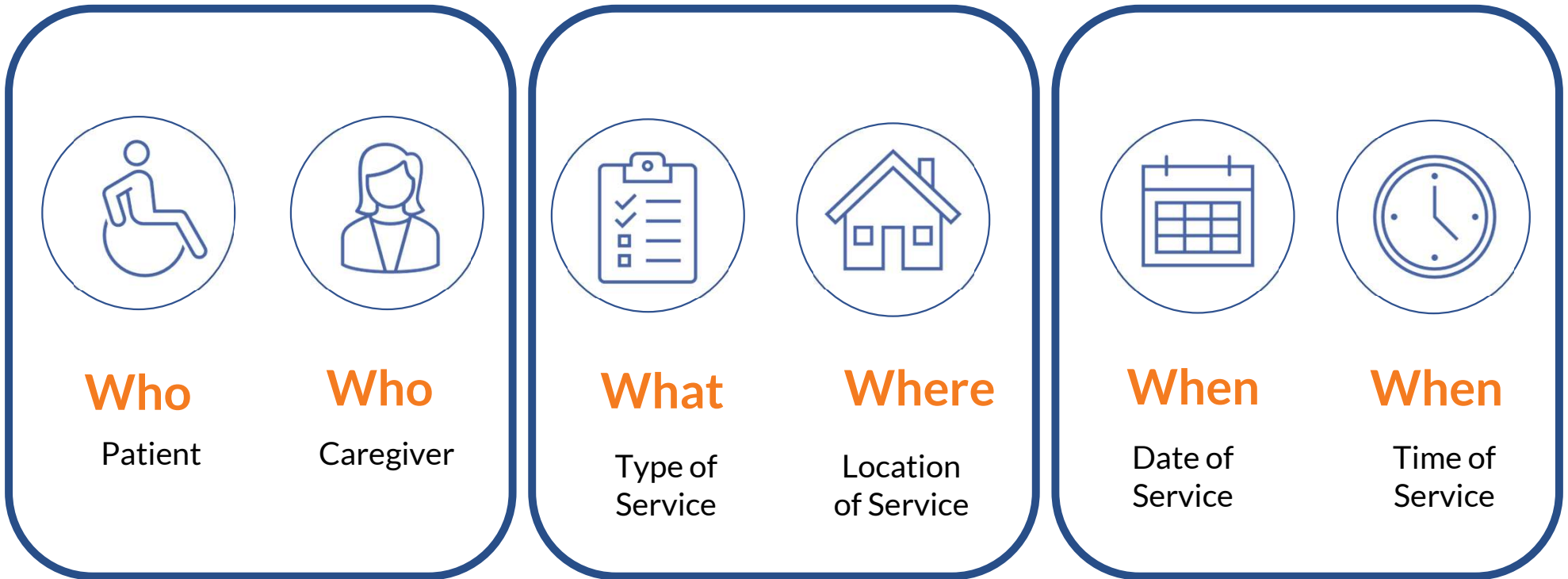


EVV Overview

EVV Tracker



6 Elements of a Cures Compliant Visit



Note: Any adjustments made to a visit is considered non-compliant.

HHAEExchange Standard System Terminology

Corresponding Terminology

CONTRACT / PAYER	<ul style="list-style-type: none"> - FFS - HHS 	<ul style="list-style-type: none"> - MCO - State 	<ul style="list-style-type: none"> - Plan
PATIENT / MEMBER	<ul style="list-style-type: none"> - CDS Employer - Consumer 	<ul style="list-style-type: none"> - Recipient - Client 	<ul style="list-style-type: none"> - Participant - Beneficiary
CAREGIVER	<ul style="list-style-type: none"> - Aide - Homecare Aid - Homecare Worker 	<ul style="list-style-type: none"> - Worker - Direct Care Worker - Service Provider 	<ul style="list-style-type: none"> - Attendant - CDS Employee
AGENCY / PROVIDER	<ul style="list-style-type: none"> - FMSA - Vendor 	<ul style="list-style-type: none"> - Program Provider 	
COORDINATOR	<ul style="list-style-type: none"> - Care Coordinator - Case Coordinator 	<ul style="list-style-type: none"> - Service Coordinator - Care Types 	
UNITY NUMBER	<ul style="list-style-type: none"> - EMPI - Master Patient Number 	<ul style="list-style-type: none"> - Shared Patient Number 	
SECONDARY IDENTIFIER	<ul style="list-style-type: none"> - MPI - Promise Code 		






Scheduling

(Single Visit vs Master Week)

Scheduling: Single Visit Workflow



Step 1	Step 2	Step 3
 <p>Access Patient Calendar</p> <p><i>Navigate to the Patient's Calendar > Select the appropriate Calendar date for the visit.</i></p>	 <p>Create New Visit</p> <p><i>Select New Non-Skilled Visit. Enter required visit details: Scheduled Time, Caregiver, Pay code, Primary Bill to, and Service code.</i></p>	 <p>Save & Confirm Visit</p> <p><i>Review visit details for accuracy. Select Save to create the scheduled visit.</i></p>



Note: If the employment type does not match patient discipline the caregiver cannot be scheduled.

Abrams Jason Active

Home Phone
305-910-9437

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

Languages
--

Date of Birth
04/01/2000

Contract
Life Care Demo Payer (KHC)

Patient [Alt ID]
-- [21321312]

Coordinators
Default

Admission ID
KHC-900084

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: May Year: 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 Workflow



Step 1	Step 2	Step 3
 <p>Access Master Week</p> <p>Navigate to the Patient's Master Week > Select Add Master Week > Choose the From Date.</p>	 <p>Build Recurring Schedule</p> <p>Enter required visit details for the specified recurring days of the week: Scheduled Time, Caregiver, Pay code, Primary Bill to, and Service code.</p>	 <p>Save & Deploy</p> <p>Review visit details for accuracy. Select Save to create the Master Week visit. Select Update Calendar to deploy the Master Week to the patient calendar.</p>



Note: Selecting **Update Calendar** is required to generate scheduled visits from the Master Week.

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

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- General
- Contracts/Insurance
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Calendar

History Legend

Month: May Year: 2025 Go

Add Weekly Variable Schedule Add a Visit

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
28	29	30	<div style="border: 1px solid #ccc; padding: 5px; background-color: #e6f2ff;"> <p>📅 S: 01:15 PM - 02:15 PM (T)</p> <p>V:</p> <p>Billed: N</p> <p>👤 Martinez Greg (T)</p> </div>	2	3	4

Knowledge Check- Scheduling



When creating a Master Week, why is the Update Calendar button an essential final step?

- A. It automatically assigns multiple caregivers to one visit
- B. It sends a notification to the caregiver about their new schedule
- C. It saves the changes, so the recurring visits appear on the calendar**
- D. It locks the schedule so no further edits can be made








Mobile App Setup

Enable Your Mobile App Access Workflow



Step 1	Step 2	Step 3
		
Access Caregiver Resources	Review Getting Started Guides	Download & Register
<i>Navigate to the Caregiver Knowledge Base</i>	<i>Select Getting Started > Open Getting Started in the Mobile App</i>	<i>Caregiver follows guided steps to: Select Download the Mobile App > Register & Sign in > Begin using the app for EVV visit capture</i>



Note: After a successful registration, the Agency will send an **Activation Code**.

Got questions? Check out these resources!

HHAeXchange Users



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)

Pavillio Users



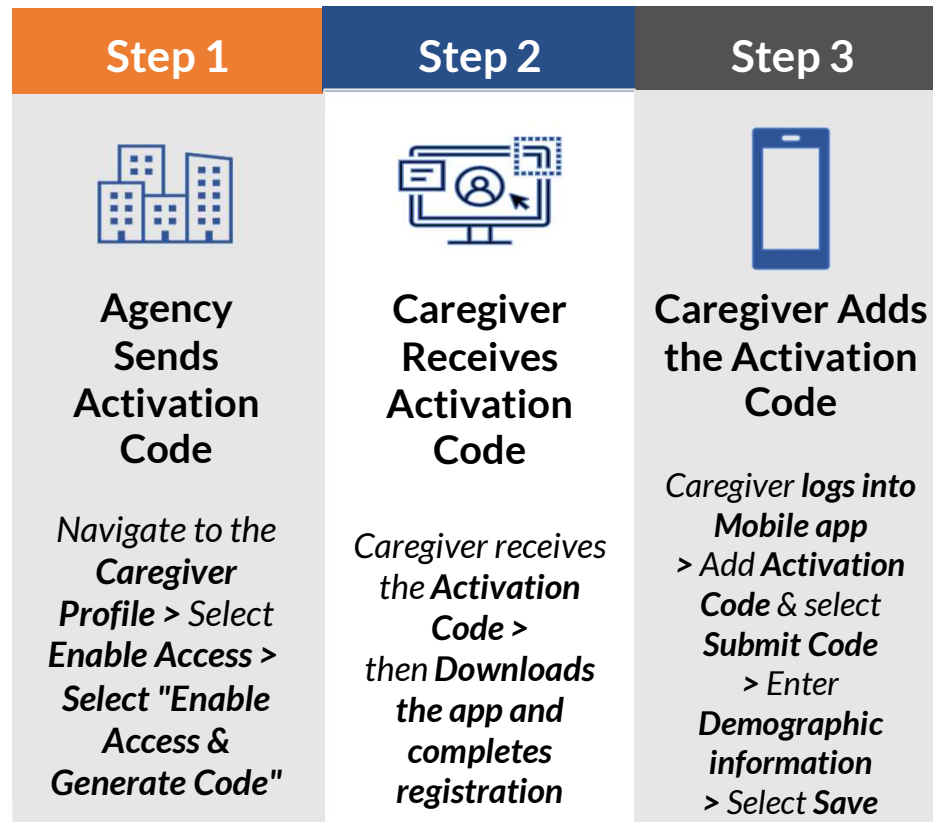
Pavillio

Administrators, Caregivers and Clients using the Pavillio platform.

✕
Hello! How can I assist you today?



Mobile App Activation Code Setup Workflow



Note: Caregivers **must** complete registration before their first visit.



Mobile App Settings: Activation Code



- Sending out the activation code is based on notification preferences.

The screenshot displays the 'Profile' page of the HHAeXchange+ system. A modal dialog titled 'Enable Mobile App Access' is open, showing options for sending an activation code to the caregiver. The dialog includes a 'Send code to Caregiver:' section with three radio button options: 'Do not send code', 'Send by email', and 'Send by text (SMS)'. A warning message states 'Caregiver does not have email address configured.' The 'Enable Access & Generate Code' button is highlighted with a blue circle containing the number 4. The background shows the caregiver's profile information, including name, date of birth, social security number, and address. The 'Mobile App Settings' section at the bottom shows the 'Mobile App Access' toggle set to 'Enable Access' (highlighted with a blue circle containing the number 2).

Allen Don Active

Date of Birth
1987-01-29

Caregiver Code
UMA-1066

Availability Updated
4/5/2024

Home Phone

Address
CHICAGO, IL, 60629

Languages

Provider (Office)
UMA Healthcare (PE Training Use Only)
(UMA MI office)

Team
Select

Caregiver Hours
H 0 | V 0

- Profile
- Compliance
- Calendar
- Visits
- In Service
- Rates
- Notes
- Preferences
- Absence/Restriction
- Availability
- Payroll Info
- Pay Check
- Patient History
- Others
- Document Management

Profile

Profile Log [Edit](#)

Caregiver Type * 🔔
Employee

Demographics



First Name
Don

Middle Name
--

Last Name
Allen

Initials
DA

Gender
Male

Date of Birth * 🔔 History
01/29/1987

Caregiver Code *
UMA-1066

Alt.Caregiver Code
--

Time & Att. PIN
100066

Social Security Number * 🔔 History
675-54-7865

Secondary Offices 🔔
--

Rehire Rehire Date
No --

Ethnicity
--

Country of Birth
--

Marital Status
--

Dependents
--

Upload Picture

Contact Information

Address
CHICAGO, IL, 60629

Primary Phone
--

Secondary Phone
--




Tertiary Phone
--

History

[Chat](#)

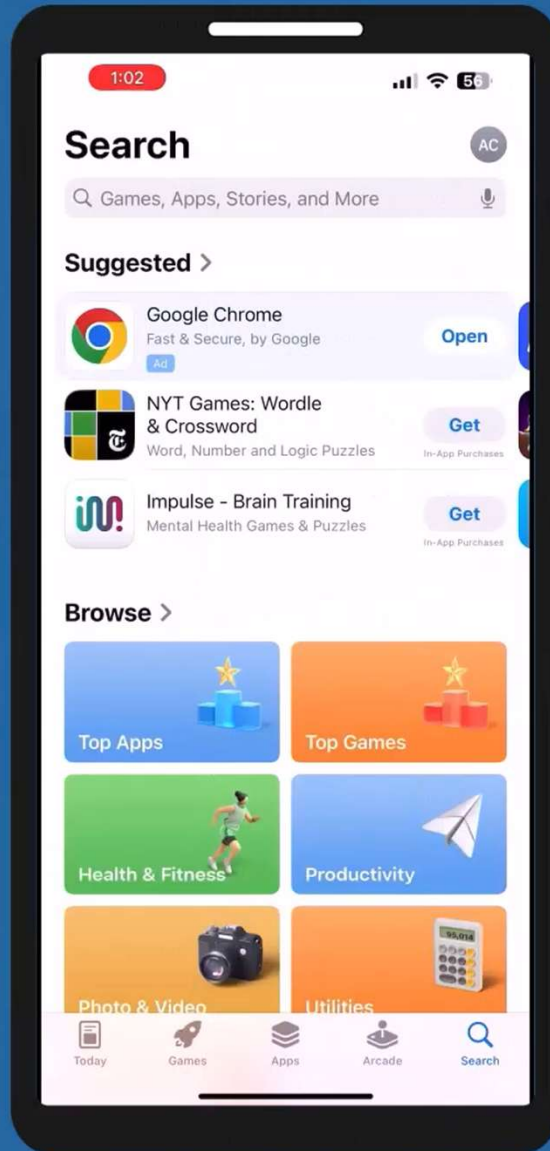
Mobile App Setup Workflow



Step 1	Step 2	Step 3
 <p>Download the HHAexchange+ Mobile App</p> <p><i>Navigate to the App Store or Google Play > Search for and download the HHAeXchange+ Mobile App</i></p>	 <p>Create Account & Verify</p> <p><i>Select Sign Up Here > Enter email and password, then tap Sign Up > Verify email from inbox</i></p>	 <p>Activate & Finalize Setup</p> <p><i>Log in and enter the activation code provided by the agency > (Optional) Enable Biometric ID > Set and save Offline PIN > Registration Complete</i></p>




Note: The **activation code** is **required** before caregivers can begin capturing EVV visits in the mobile app.



New HHAExchange+ Mobile App Caregiver User Guide




[HHAExchange+ Caregiver
User Guide](#)





HHAExchange+ Mobile: A Step-By-Step Guide for Caregivers


Use this guide to get started with the HHAExchange+ app, from first login through clocking out. Each step is simple, visual, and made to keep your day running smoothly!



Getting Started: Download, Sign Up, and Register

- 

Download HHAExchange+ app.
- 

Open the app and select your Language preference and tap **Apply**.
- 

Tap **Sign Up Here**.
- 

Enter your email address, create and confirm password, then tap **Sign up** to create your account.
- 
- 

Email Verified
You have successfully verified your email address. Please return to the mobile application to complete the account.

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Knowledge Check- Mobile App Settings



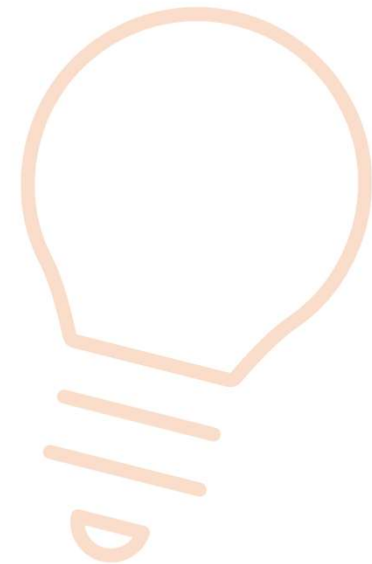
Where in the caregiver's profile should you send the activation code from?

A. Visit Maintenance screen

B. Mobile App Settings section

C. Authorization details

D. Patient profile





Visit Capture Overview

Visit Capture Overview



What is it?

- EVV capture methods are the approved ways caregivers record visit information electronically at the time services are provided.

Why does it matter?

- Using approved EVV methods ensures visits are compliant, reduces exceptions, and minimizes manual corrections later.

How do Caregivers capture EVV?

- Mobile App (preferred) and IVR (alternative)



Note: Disclaimer: Steps may vary depending on the mobile app you have.

EVV Capture Methods



What is it?

EVV capture methods are approved ways caregivers record visits electronically to ensure compliance.



Mobile App

Preferred EVV Method

- ✓ Smartphone-based
- ✓ GPS verified
- ✓ Offline capable



IVR

Alternative EVV Method

- ✓ Uses patient's landline
- ✓ Voice-based clock in/out



> Mobile App Overview

What is it?

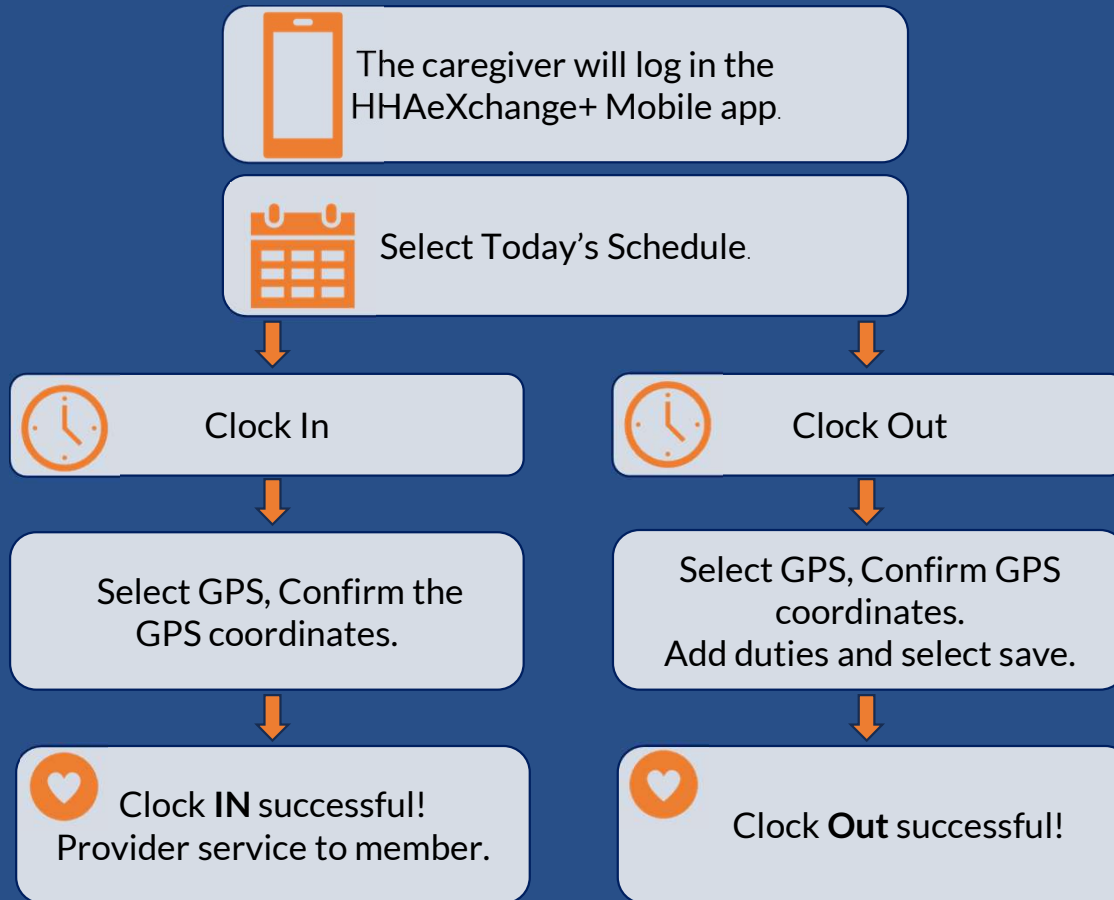
- The HHAeXchange+ Mobile App allows caregivers to capture EVV by clocking in and out directly from their mobile device at the patient's location.

Why does it matter?

- The mobile app is the preferred EVV capture method and helps ensure visits are recorded accurately using time and location data, reducing exceptions and manual corrections.



Visit Capture – Mobile App



EVV – (Un)Scheduled Visit Clock In & Clock Out



Scenario:

The caregiver arrives at the patient's home to begin a **scheduled** (an **unscheduled**) visit and uses the **HHAeXchange+ Mobile App** to clock in. After completing the visit, the caregiver clocks out to accurately capture the visit for EVV compliance.



Clock In/Out of Scheduled Visits

- 1** Tap Schedule.
- 2** Tap scheduled shift, then EVV Clock In.
- 3** Confirm you are within range (blue circle) of Service Location, then tap Continue.
- 4** Receive prompt that EVV Clock In is successful.
- 5** To clock out, repeat steps 1-2 to and tap Continue Shift.
- 6** Tap Duties (if required).



How to Clock In and Out for a Scheduled Visit in the HHAeXchange+ Mobile App

This video uses the Standard System Terminology

***Your state or payer may utilize different terminology in the platform**



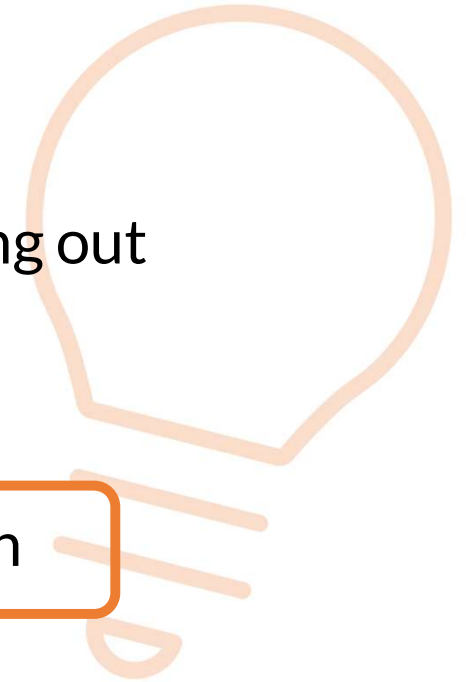
 HHAexchange

Knowledge Check – EVV: Clock In/Out



A caregiver provides care to a patient, but no visit was scheduled in advance. What should the caregiver do?

- A. Do not clock in since the visit was unscheduled
- B. Wait for a scheduler to add the visit before clocking out
- C. Clock in under a different scheduled visit
- D. Clock in and out using the unscheduled visit option**



Offline Mode Overview

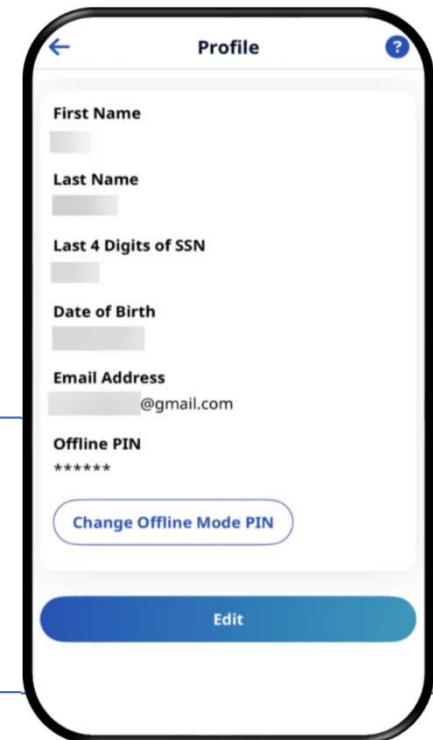


Offline Mode allows caregivers to capture EVV using the Mobile App when there is no to low internet or cell service.

- Automatically activates when there is no signal and syncs once connectivity is restored
- Caregivers use their Offline PIN to clock in and out

How to Use Offline Mode Pin

- **Log in** to the app
- Go to **Menu > Profile**
- Select "**Change Offline Mode PIN**"
- Enter your new **PIN** and select **Save**.



Note: The Offline PIN is created by YOU when you first register for the HHAExchange+ mobile app.




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


-  Log in to the mobile app while you still have internet so it can load your visit and patient information.
-  Once you're in an area with poor signal, turn off your cellular data to enable offline mode.
-  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

-  Complete your visit tasks as usual (clock in/out, and/or enter duties).
-  The mobile app will upload everything once you're back online.

GET BACK ONLINE TO SYNC YOUR WORK

-  Turn on your cellular network.
-  Open the mobile app and log in.
-  Offline activity will upload automatically once you're back online.

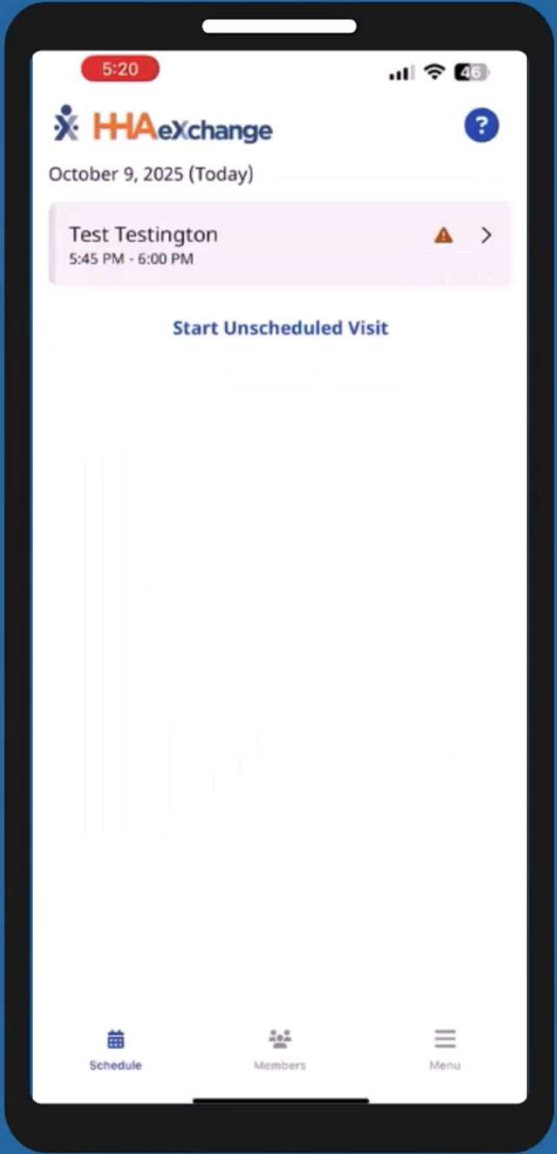
 Your clock-ins/outs and duties are automatically saved and synced!

[Knowledge Base: Offline Mode](#)



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





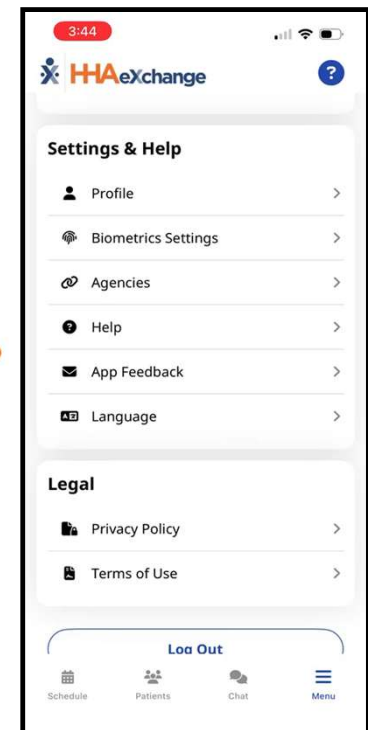
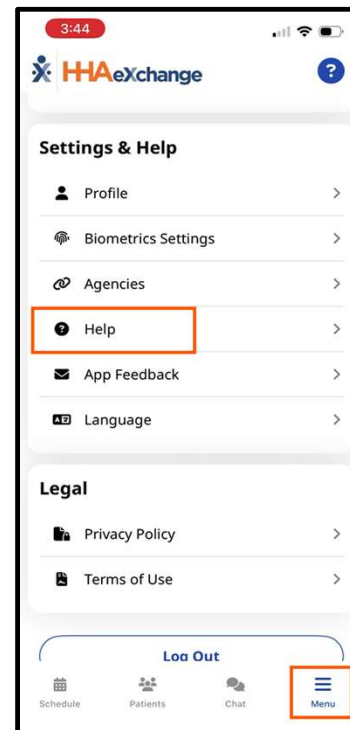
➤ Troubleshooting – Mobile App Help



The Help feature offers in-app support for caregivers in the field.

How to Access:

1. Open the HHAX+ Mobile App and log in
2. Navigate to the Help section
3. Review the available troubleshooting guidance
4. Follow the recommended steps to access necessary support resources



> IVR Overview



What is it?

- IVR (Interactive Voice Response) allows caregivers to capture EVV by calling a designated phone number from the patient's landline.

Why does it matter?

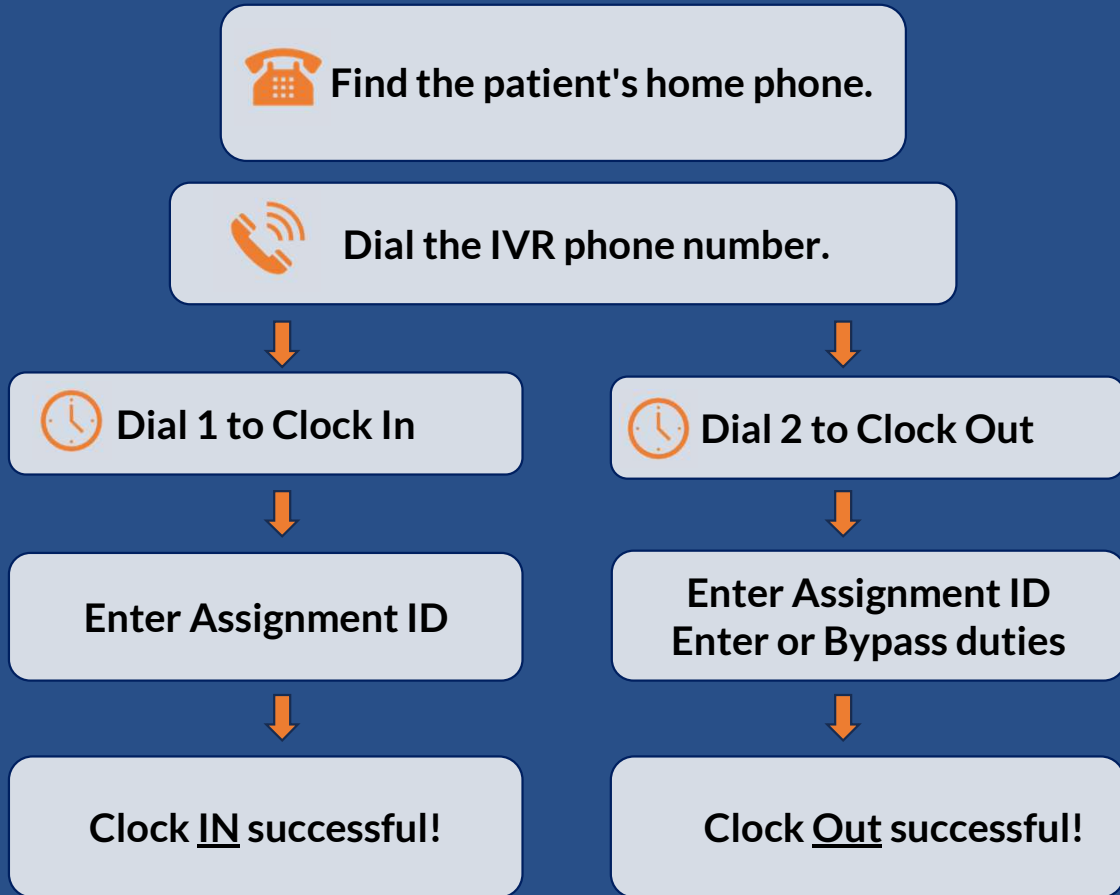
- IVR provides an alternative EVV capture method when mobile devices are not used and helps ensure visits are recorded electronically.





IVR Capture

Interactive Voice Response Number English & Spanish

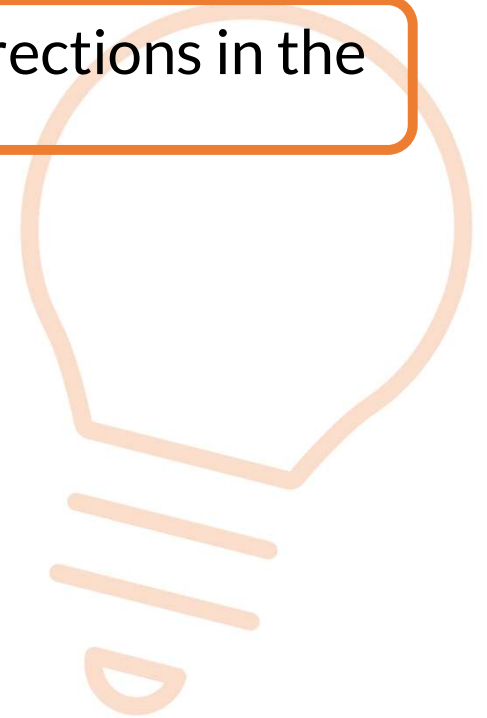


Knowledge Check – Best Practices



Why is it important to apply both timing and location best practices during EVV visits?

- A. It ensures compliance and minimizes manual corrections in the system
- B. It allows staff to skip reporting issues
- C. It guarantees faster payments from payers
- D. It reduces the need for scheduled visits





Key Takeaways

Key Takeaways



- Build clean schedules to support accurate EVV
- Use Single Visits and Master Weeks to reduce scheduling errors
- Setting up the Mobile App and IVR ensures caregiver success on the very first visit
- Follow timing and location best practices when caregivers clock in and out
- Clean scheduling and visit capture prepare you for what's coming next: *Visit Verification and Maintenance*.



Resources



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



<https://www.hhaexchange.com/info-hub/illinois-doa-drs>

The screenshot shows the HHAExchange website interface for the Illinois DOA & DRS Information Center. At the top, there is a navigation bar with the HHAExchange logo, menu items for 'Homecare Software', 'Technology', 'Resources', and 'Company', and a 'Request Your Demo' button. Below the navigation bar is a dark blue header section featuring the Illinois state icon and the text 'Illinois DOA & DRS Information Center' with a 'Provider Enrollment Form' button. A 'TABLE OF CONTENTS' sidebar is visible on the left, listing 'OVERVIEW', 'PARTICIPATE IN TRAINING', 'UNDERSTANDING ALTERNATIVE EVV (EDI)', 'SERVICES IN SCOPE', and 'NEED SUPPORT'. The main content area is titled 'WELCOME TO HHAEXCHANGE' and contains the following text:

The Illinois Department of Healthcare and Family Services, the Illinois Department on Aging (DOA), and Illinois Division of Rehabilitation Services (DRS) have partnered with HHAExchange to support providers in maintaining compliance with state and federal EVV requirements and to deliver a streamlined, user-friendly experience.

As part of this agreement, HHAExchange's EVV Portal will be deployed as the only no cost offering to program providers. HHAExchange's EVV Portal will go live for providers on **March 2, 2026**, but there are a few steps you must take to ensure you are set up well in advance of this date.

All providers must **EITHER** use the HHAExchange EVV Portal **OR** ensure that the provider's chosen EVV vendor connects with HHAExchange to aggregate EVV data. The HHAExchange EVV Portal will enable you to easily meet Illinois state requirements, providing a streamlined and user-friendly experience for both back-office staff and caregivers. In addition, Illinois providers will benefit by leveraging the HHAExchange EVV Portal for workflow efficiencies including:

- Managing schedules based on authorizations, plans of care, and individual patient needs
- Offering intuitive EVV tools to caregivers, including a robust mobile application available in 20+ languages
- Ensuring a seamless transition of EVV data to the state aggregator

For providers that already use an EVV system today, you may also use your own EVV system to connect with



Provider Resources: HHAeXchange Provider Knowledge Bases



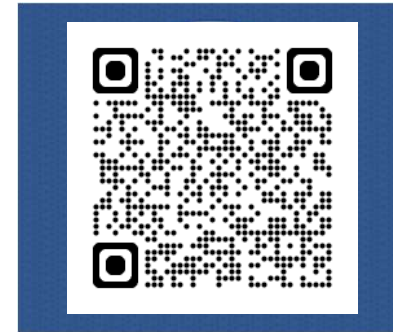
Provider Knowledge Base

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



Caregiver Knowledge Base

<https://knowledge.hhaexchange.com/caregiver/Content/Home/Home-CG.htm>



EDI Knowledge Base

<https://knowledge.hhaexchange.com/edi/Content/Home/Home-C.htm>



Additional Resources

Need to reach out for assistance? Here are some additional resources:

HHAeXchange Client Support Portal and Email:

[Client Support Portal](#) or ILsupport@hhaexchange.com

DHS' Division of Rehabilitation Services (DRS):

DHS.EVV@illinois.gov, [DRS EVV Website](#)

Department on Aging (DOA):

Aging.EVV.Support@illinois.gov

HHAeXchange Illinois EVV Helpline:

(833) 961-7429





Resources



Knowledge Base:

- [Schedule Overview & EVV Management](#)
- [Schedule Types](#)
- [Mobile Videos](#)
- [Getting Started Videos](#)
- [Link Mobile ID with caregiver profile](#)

eLearning Base:

- [HHAeXchange Enterprise Training: Caregiver](#)
- [HHAeXchange Enterprise Training: Scheduling](#)

Training Videos

- [Manage Schedules](#)
- [How to Create an Individual Visit](#)
- [How to Create a Master Week](#)
- [EVV Overview](#)
- [How to Enable Mobile App Access](#)
- [How to Clock In and Clock Out of the HHAeXchange+ Mobile App](#)
- [How to Locate Time & Attendance PIN](#)
- [How to Save the IVR Phone #](#)
- [How to Clock In and Out via IVR](#)
- [HHAeXchange+ Caregiver User Guide](#)






Next steps



Next Steps



-  Ensure caregivers download and register for the HHAeXchange+ mobile app
-  Ensure caregivers are accurately capturing visits using one of the approved methods
-  Attend the Phase 3: Visit Maintenance webinar

IL DRS & DoA EVV Operations Setup: Visit Maintenance



Webinar Registration - Zoom
[Register Here](#)
Tuesday, March 10 @ 11:00
AM ET



Questions?



Illinois DOA & DRS State
Info Hub

**THANKS FOR
ATTENDING!**



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