

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

IL ENT Providers – Migration to Linked Payer Process

February 2026

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George Marquez



- **Role: Senior Training Specialist**
- **Tenure at HHAeXchange: 7 Years**
- **Areas of Expertise: State Implementations**
- **Fun Fact: Deep dish pizza is one of my favorite Pizzas.**



Who is this session for?

This session is designed for ENT(Enterprise) Providers using HHAeXchange who are transitioning to Linked Contracts as part of the DRS & DOA implementation.

Note: The use of Linked Contracts to track and report EVV Compliance to the state of IL will be **required as of 4/1/2026**.

Today's Objectives

You will be able to:

- **Identify** and verify key placement details.
- **Apply** the process of accepting and merging linked placements.
- **Create** and update schedules.



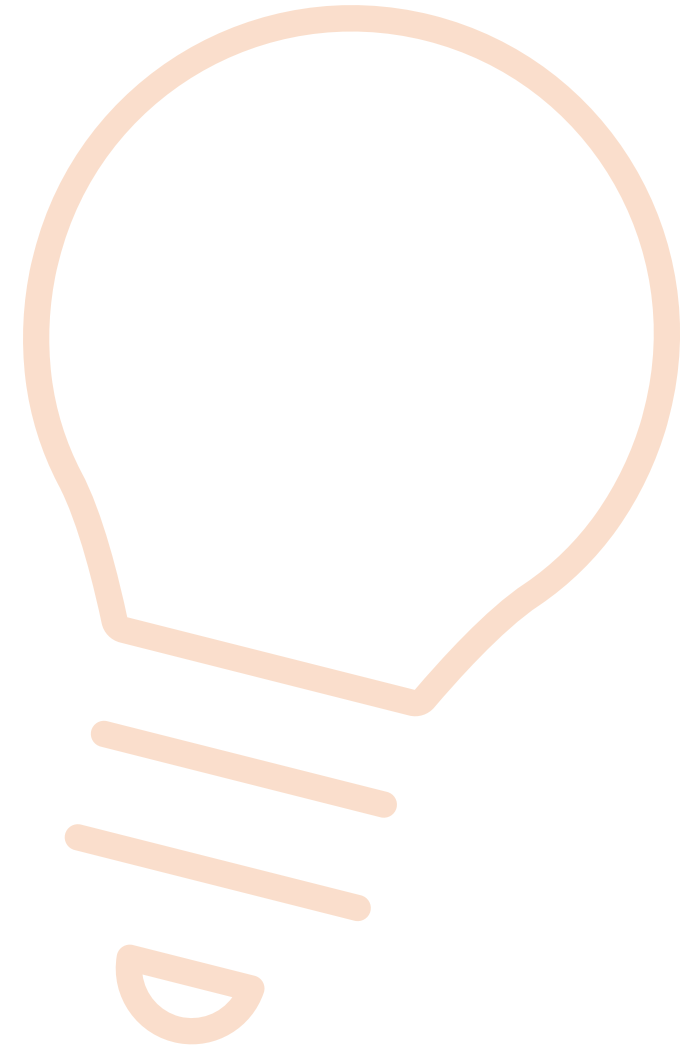
Knowledge Check

You'll see these throughout the presentation!



What is my favorite kind of Pizza?

- A. Tavern style
- B. Detroit style
- C. Deep dish
- D. Stuffed Crust



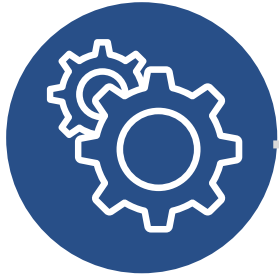


Agenda

- EVV Overview
- Housekeeping
- Contract Setup Search
- Patient Placements
- Scheduling
- Reports
- Adding PSA & CCU Information
- Key Takeaways
- Resources Questions



EVV Tracker



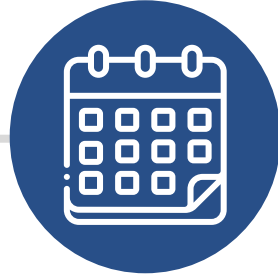
**AGENCY
CONFIGURATION**



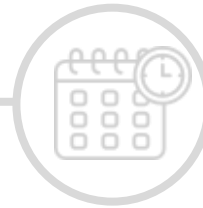
**CAREGIVER
MANAGEMENT**



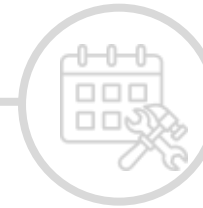
**PATIENT
MANAGEMENT**



SCHEDULING



VISIT CAPTURE



VISIT
VERIFICATION
&
MAINTENANCE

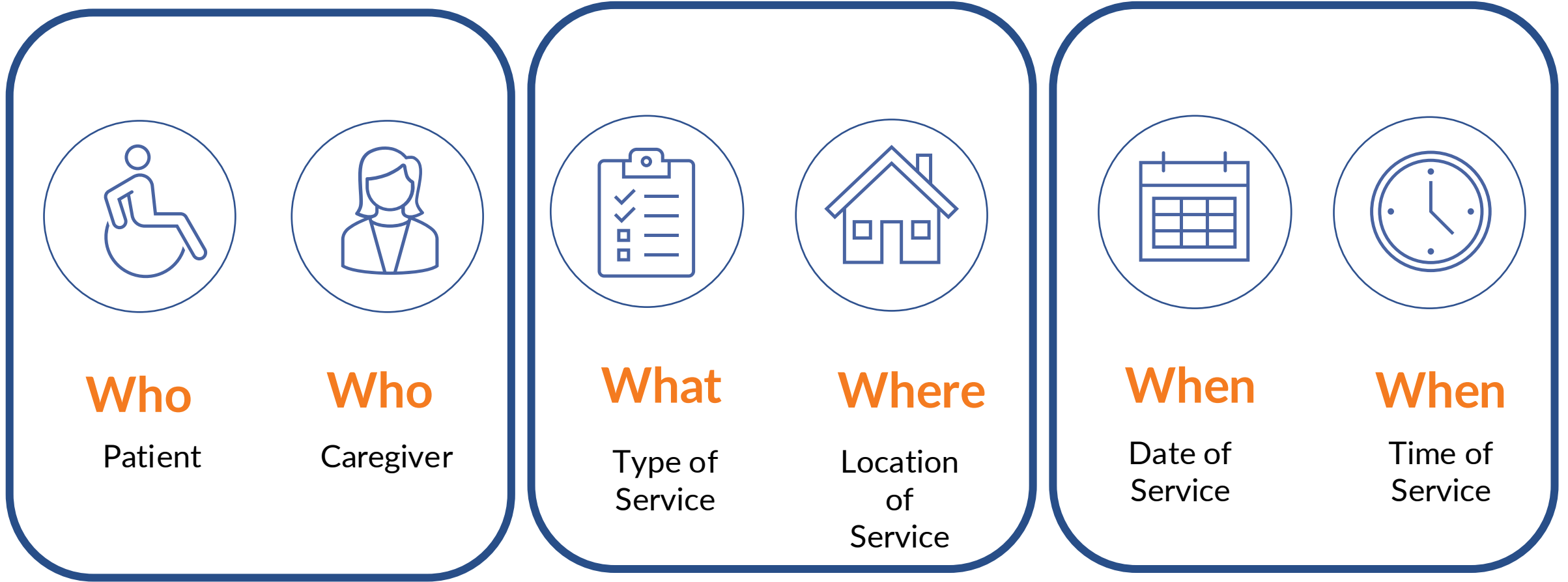


BILLING



REPORTING
&
COMPLIANCE
MONITORING

6 Elements of a Cures Compliant Visit



Note: If any of these EVV elements of a visit are missing or incorrect, the visit will be considered an **Exception.**

Housekeeping

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EVV Compliance Requirements



Provider Scenarios	DOA	DRS
<p>Non-Compliant Providers: Current agencies out of compliance with IDoA/DRS EVV requirements</p>	<p>If a provider is found non-compliant, they will receive a notice and must submit a corrective action plan within 30 days. Failure to comply may result in suspension or termination.</p>	<p>DRS has instructed their agency providers to secure a free solution (Sandata in the past – transitioning to HHAExchange) or a paid Alt-EVV solution when we have sent the agency policy earlier in writing.</p>

Why use Linked contracts ?

- Single Source of Truth
- Accurate & Consistent Data
- EVV & Billing
- Correct Payer Setup



IL HFS is requiring a 75% EVV compliance per quarter starting April 1, 2026. Please ensure you reference DRS and DOA policy for EVV compliance requirements and expectations.

Stay On Track With Linked Contracts



Prevents:

- EVV not counted towards 75% threshold.
- Linked placements allow EVV to aggregate automatically. **Internal placements will NOT aggregate after April 1.**
- Missing authorizations!
- Duplicate patient records!
- Missing linkage = missing payer updates (auth changes)

Services in Scope for EVV in Illinois



1. Navigate to the [State info hub](#)
2. Click on “Services in Scope”
3. Scroll through this page to see services in scope for IL DOA & IL DRS

TABLE OF CONTENTS

- OVERVIEW
- FREQUENTLY ASKED QUESTIONS
- PARTICIPATE IN TRAINING
- UNDERSTANDING ALTERNATIVE EVV (EDI)
- SERVICES IN SCOPE**
- NEED SUPPORT

IMPORTANT DATES

- PORTAL ACCESS BEGINS
January 26, 2026
- DOA MEMBER & AUTH DATA AVAILABLE
February 2, 2026

Service in Scope

See Below the Services in Scope for the IL DOA / DRS Implementation of EVV going Live on March 2, 2026:

DoA:

- S5130 - Homemaker ** NOT LIVE IN SITE

DRS:

Personal Care:

- S5130 - Homemaker Services

Home Health Care Services:

- T1003 - LPN - Agency
- T1002 - RN - Agency
- T1004 - CNA - Agency
- G0299 - RN - Agency (visits < 2hrs)
- G0300 - LPN - Agency (visits < 2hrs)

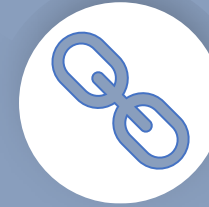
> Before You Begin: 4 Things to Prepare



Step 1: Portal readiness!



Step 2: Identify contract types.



Step 3: Prepare for merging.



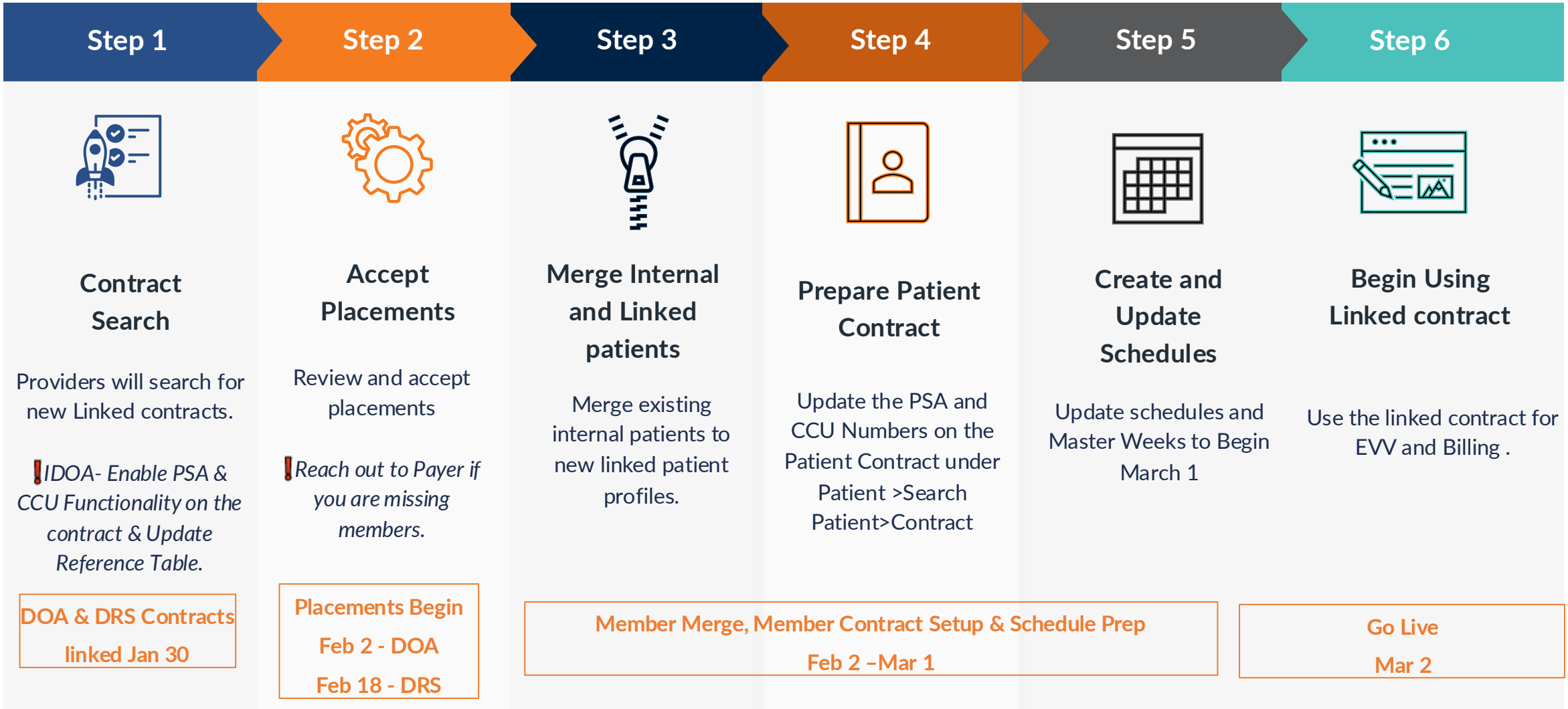
Step 4: Prepare for scheduling and billing



Tip: Please review the [Linked Contracts 101](#) video.



Linked Contract Readiness : Timeline & Workflow



Contract Setup Search

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Step 1: Contract Search

Identify Linked Contract.



Reviewing the linked contract :

- In the **Contract setup search**, filter to view Linked (UPR) contracts.
- **Internal** = Provider-created
- **Linked** = Payer-created
- For multi-office setups, ensure all offices are attached to the linked contract.

Search Contracts (2)

Contract Name	Office	Invoice Type	Auth Required	Required Compliance	Status	Effective	Expires	Contract Type	Linked Contract Type	Service Codes	Action
Life Care Demo Payer (UMA)	Offices (UMA MI office)	invoiceformat	Yes	No compliance	Active				Linked (UPR)	Service Codes	 
Life care INT	Offices (UMA MI office)	invoiceformat	No	No compliance	Active	03/01/2024	05/22/2040	Internal		Service Codes	 

 IL DOA & DRS contract linking occurred Jan 30.

Hello georgem

Placements (9 Pending)

System Notifications

Direct Messages

Tasks

Linked Communication

Search System Notifications

Priority

All ▾

Status

All ▾

From

mm/dd/yyyy 

To

mm/dd/yyyy 

Search

Patient Placements

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Step 2 : Review and Accept Placements

Pending Placements



Placement Process

1. Payers send placements, which appear on the **Home** screen > **Placements** > **Pending**.
2. Review and accept each placement by selecting the **Office**, **Coordinator**, and selecting **Save**.
3. Single office providers will review **Accepted with No Master Week** for confirmed placements.
4. Placements Began **Feb 2 – DOA Feb 13 - DRS**

Patient ^	Admission ID ⇅	Office ⇅	Start Date ⇅	Stop Date ⇅	Frequency ⇅	Service Category ⇅	Service Type ⇅	Request Sent At ⇅	Status ⇅	Cut Off Time ⇅	Contract Name ⇅
XXXXX	2131412	UMA MI office	11/01/2025			Home Health	PCA	11/24/2025 12:22:55 PM (Eastern)	Pending	11/27/2025 12:22:55 PM (Eastern)	Life Care Demo Payer

Previous **1** Next

 **Make sure the placement is sent to the correct office!**

Hello georgem

Placements (11 Pending)

System Notifications

Direct Messages

Tasks

Linked Communication

Placements

Pending (1)

Accepted with Temp Caregiver (9)

Staffed (0)

Accepted with No Master Week(1)

Member ▲	Admission ID ◆	Office ◆	Start Date ◆	Stop Date ◆	Frequency ◆	Service Category ◆	Service Type ◆	Request Sent At ◆	Status ◆	Cut Off Time ◆	MCO Name ◆
XXXXX	256454654	Unspecified Office	09/01/2025			Home Health	PCA	9/23/2025 2:41:19 PM (Eastern)	Pending(Broadcast)	9/24/2025 4:01:19 AM (Eastern)	Life Care Demo Payer



Step 2 : Review and Accept Placements

Missing Placements



Placement Process

1. Go to **Patient > New Patient**.
2. Complete the demographic information and **Save Profile**.
3. Go to **Patient Profile > Add Contract > Linked Contract**.

The screenshot displays the 'Contracts' page with the following data:

Placement ID	Contract	Is Primary Contract	Alt Patient ID	Service Start Date	Rank	Source Of Adm	Service Code	Plan Code	Discharge Date	Discharge To	Action
33781609	Life Care Demo Payer (KHC)	<input checked="" type="checkbox"/>	32423423	08/01/2023	--	--	--	--	--	--	...

Placement ID	Date	Contract	Note	User Name
33781603	8/8/2023 5:01:15 PM	Life Care Demo Payer (KHC)	Please note that Placement (33781603) has been deleted due to a new placement (33781606) sent by the payer.	Auto Placement (13437)

 **Make sure the F. & L. Name , DOB, SSN, Medicaid ID are correct.!**

Hello georgem

- Placements (11 Pending)
- System Notifications**
- Direct Messages
- Tasks
- Linked Communication

Search System Notifications

Priority

Status

From

To

Search

Knowledge Check

Placements



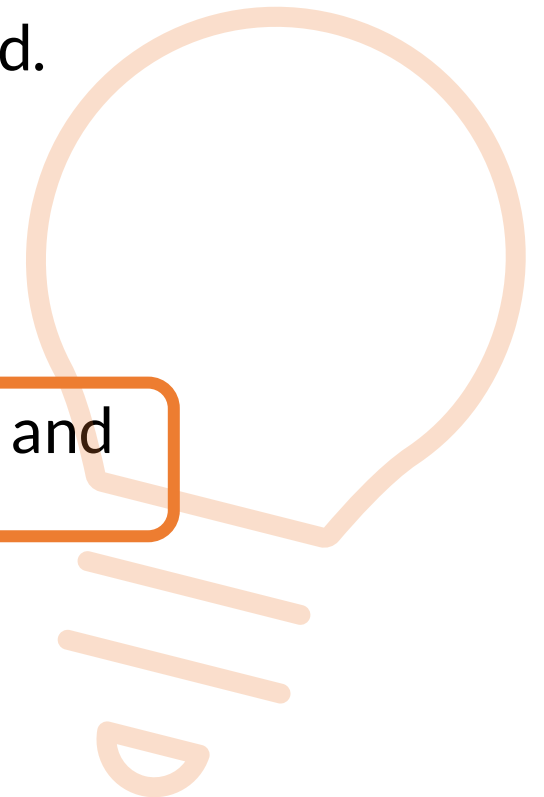
You're ready to accept a new placement in HHAeXchange, but the system asks you to add a coordinator. What should you do?

A. Skip adding a coordinator – it can be done later if needed.

B. Add the caregiver who will be servicing this patient.

C. Add the coordinator responsible for the patient's service and scheduling.

D. Add the biller.





Step 3: Merge

Patient Merge



Merging Patient Records:

1. Go to the **Patient General** tab.
2. Click **Edit**.
3. Select **Patient Merge** to combine the records.
4. Click **Save**.



Tip: Patient Identifiers must match to merge.

- **SSN**
- **Medicaid ID**
- **Full Name + DOB**

Merge Patient Record

History

Merge Patient

Admission ID	Alt. Patient ID	Patient Name	Contracts	Status	Action
UMA-900191		Bethune Issac	Life care INT	Completed	Action

Hello georgem

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

Search System Notifications

Priority

All

Status

All

From

mm/dd/yyyy

To

mm/dd/yyyy

Search

Knowledge Check

Merging Placements



Why should you merge an internal patient record with a linked patient record in HHAeXchange?

- A. To keep both records, separate for tracking.
- B. To delete the old record so only the linked one remains.
- C. To keep visit and authorization history together under the linked record for EVV and billing compliance.**
- D. To wait for a third profile to merge.



Scheduling

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Step 4: Scheduling

• Single Schedule

Schedules should be updated to prevent service interruptions.

- Steps for updating schedules:
 1. Go to **Visits**
 2. Search **Scheduled visits**
 3. Update **Bill to & Service code**



IMPORTANT NOTE:

Schedules and Master weeks should be updated to start March 1!

Masterweek

End the current Master Week, then create a new one for the new contract

- Step for creating Master Week.
 1. **Patient > Master Week**
 2. **Add Master Week**
 3. Select **Hours** – Create Master Week schedule
 4. **Select Save**
 5. **Select Update**

Bethune Issac Active

Home Phone
465-854-3746

Address
123 Main St, NEW YORK, NY, 10036

Languages
--

Date of Birth
10/15/1965

Patient [Alt ID]
-- [5346274]

Admission ID
UMA-900096

Contract
Life Care Demo Payer (UMA), Life care INT

Coordinators
Default

Office
UMA MI office

Patient Search

- General
- Contracts/Insurance
- Profile
- Eligibility Check
- Auth/Orders
- Special Requests
- Master Week

Calendar

- Visits
- POC/PCP
- Caregiver History
- Rates

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 INT	6545466546	10/01/2025	12/31/2025	PCA	T1019	N/A	Hourly	Entire Period	0 hrs								0 hrs		...
Life Care Demo Payer (UMA)	454811155156	04/01/2025	12/31/2025	PCA	T1019	N/A	Hourly	Entire Period	500.00 hrs								0 hrs		...
Life Care Demo Payer (UMA)	5356535435	05/01/2024	01/01/2025	HMK	S5130	N/A	Hourly	Entire Period	50000.00 hrs								0 hrs		...

Calendar

History Legend

Month Year
 < > November 2025 Go

Add Weekly Variable Schedule Add a Visit

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
--------	---------	-----------	----------	--------	----------	--------

* Special Requests

📅 Master Week

📅 **Calendar**

🏠 Visits

📅 POC/PCP

🕒 Caregiver History

☆ Rates

💰 Financial

🏠 Family Portal

📄 Doc Management

Life Care
Demo
Payer
(UMA)

temp

03/01/2024

03/31/2024

PCA

T1019

N/A

Hourly

Entire Period

100.00
hrs

0 hrs



Calendar

History

Legend



Month

Year



October

2025

Go

Add Weekly Variable Schedule

Add a Visit

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
29	30	1	2	3	4	5
6	7	8	9	10	11	12
<div style="border: 1px solid #ccc; padding: 5px;"> <p>🗓️ S: 10:00 AM - 11:00 AM</p> <p>📅 V:</p> <p>Billed: N</p> <p>👤 Reynolds Sam</p> </div>	<div style="border: 1px solid #ccc; padding: 5px;"> <p>🗓️ S: 10:00 AM - 11:00 AM</p> <p>📅 V:</p> <p>Billed: N</p> <p>👤 Reynolds Sam</p> </div>	<div style="border: 1px solid #ccc; padding: 5px;"> <p>🗓️ S: 10:00 AM - 11:00 AM</p> <p>📅 V:</p> <p>Billed: N</p> <p>👤 Reynolds Sam</p> </div>				
13	14	15	16	17	18	19
<div style="border: 1px solid #ccc; padding: 5px;"> <p>🗓️ S: 10:00 AM - 11:00 AM</p> <p>📅 V:</p> <p>Billed: N</p> <p>👤 Reynolds Sam</p> </div>	<div style="border: 1px solid #ccc; padding: 5px;"> <p>🗓️ S: 10:00 AM - 11:00 AM</p> <p>📅 V:</p> <p>Billed: N</p> <p>👤 Reynolds Sam</p> </div>	<div style="border: 1px solid #ccc; padding: 5px;"> <p>🗓️ S: 10:00 AM - 11:00 AM</p> <p>📅 V:</p> <p>Billed: N</p> <p>👤 Reynolds Sam</p> </div>				
20	21	22	23	24	25	26
27	28	29	30	31	1	2

Knowledge Check

Scheduling



What should you do to keep services going after merging a patient's records?

A. Wait for the patient to perform EVV.

B. Ask the caregiver to verbally confirm visits.

C. Update Visits and create updated Master weeks to the new linked contract.

D. Ask the caregiver to keep track of future visits until the schedule is built out.



Reports

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Reports

List of Patients ENT



Scenario:

As a coordinator I want to review all the patients I have received this week. I can use the List of Patients ENT report.

Steps:

1. Navigate to **Reports > Patients > List Of caregivers ENT.**
2. Select **Filters and Columns.**
3. Select **Print Excel.**
4. Review **Contract Name Columns**

Hello georgem

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

Placements

- Pending (0)
- Accepted with Temp Caregiver (11)
- 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



Reports

Patient Report Detail Report



Scenario:

As a coordinator I want to review all the patients I have received this week. I can use the Placement Report (Detail)(New) report.

Steps:

1. Navigate to **Reports > Vendor Management > Placement Report Detail.**
2. Select **Office, Date Range, and Placement Status.**
3. Select **View Report.**
4. Select **Export** and choose format.

Hello georgem

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

Placements

- Pending (0)
- Accepted with Temp Caregiver (11)
- 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

Reports



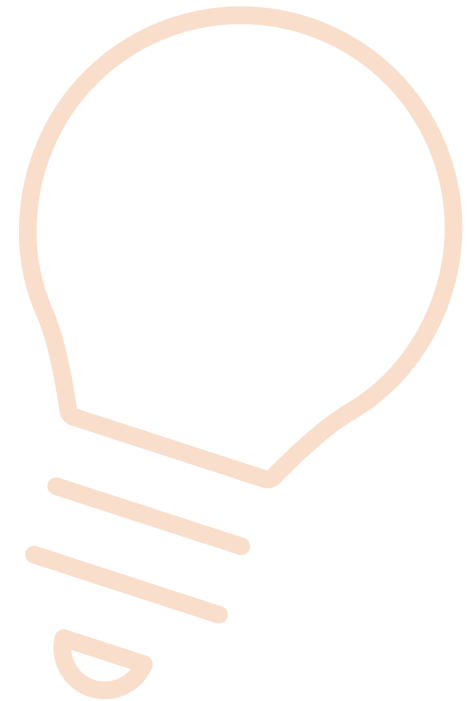
Before going live, A coordinator can use which report to review any new placements?

A. Patient Transport Report.

B. Export Report.

C. Placement Report(Detail)(New).

D. Visit Report.



Adding IDOA PSA & CCU Information

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Housekeeping – IDOA PSA & CCU



Providers will need to add the PSA and CCU information for billing linked IDOA contracts.

- **Planning and Service Areas (PSAs)/Care Coordination Units (CCUs)** will need to be added to the patient contract.
- Updated billing review holds will prevent any IDOA visits missing PSA and CCU.
- This should be added to linked contracts between Feb 2 – Mar 1.



Step 1: Adding Address to IDOA Contract



Update the IDOA contract :

- In the **Contract setup search**, filter to view **Linked (UPR)** contracts.
- **Select the IDOA Linked Contract.**
- **In the Address section, entering an IL Zip Code automatically populates the State field with IL. The IDOA PSA & CCU Numbers field appears below. Select the checkbox to enable this feature.**

Address ⓘ

Street 1: 12345 Main Street

Street 2:

City: CHICAGO

State: IL

Zip Code *: 60610 -

Phone: - -

Fax: - -

Illinois Department on Aging PSA & CCU Numbers

Enable IDOA PSA & CCU Numbers on Patient Contracts

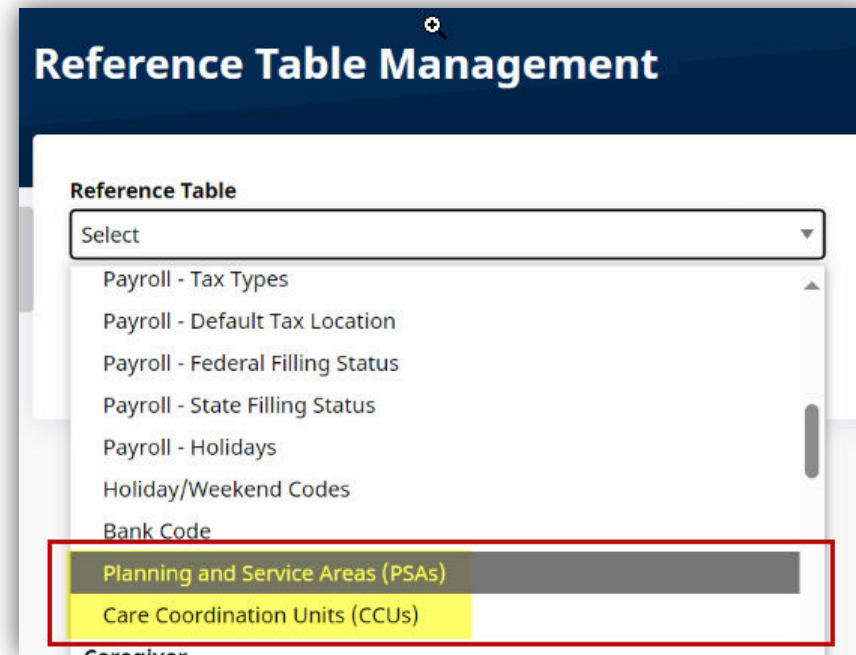


Step 2: Create PSA and CCU Values



Go to Admin > Reference Table Manager:

- PSA Number values are created and managed in the Planning and Service Areas (PSAs) table, and CCU Number values are created and managed in the Care Coordination Units (CCUs) table.



Step 3: Apply PSA and CCU Values



Go to Patient > Contracts > Edit PSA/CCU :

- Select **Add New PSA Contract #** and Select from drop down.
- Select **Add New CCU #** and select from the drop down.
- Add Effective date ranges for both.
- Select **Save**.

Edit PSA/CCU [Close]

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

PSA Contract # *
INH3216516 [Add New PSA Contract #]

PSA Effective Date Range
mm/dd/yyyy - mm/dd/yyyy [History]

CCU # *
U116465154 [Add New CCU #]

CCU Effective Date Range
mm/dd/yyyy - mm/dd/yyyy [History]

Cancel Save



Key Takeaways

IL ENT Linked Contract

Checklist :

- Make sure linked contracts are added in Contract Setup. IDOA contracts should have the PSA & CCU enabled.
- For agencies with multiple offices, make sure contracts are linked to those offices.
- Review placements based on services in scope and send them to the correct office.
- Check new authorizations and confirm caregivers are assigned to the right discipline.
- Merge internal patient profiles with their new linked profiles.
- Update schedules and create Master Weeks.



Key Takeaways



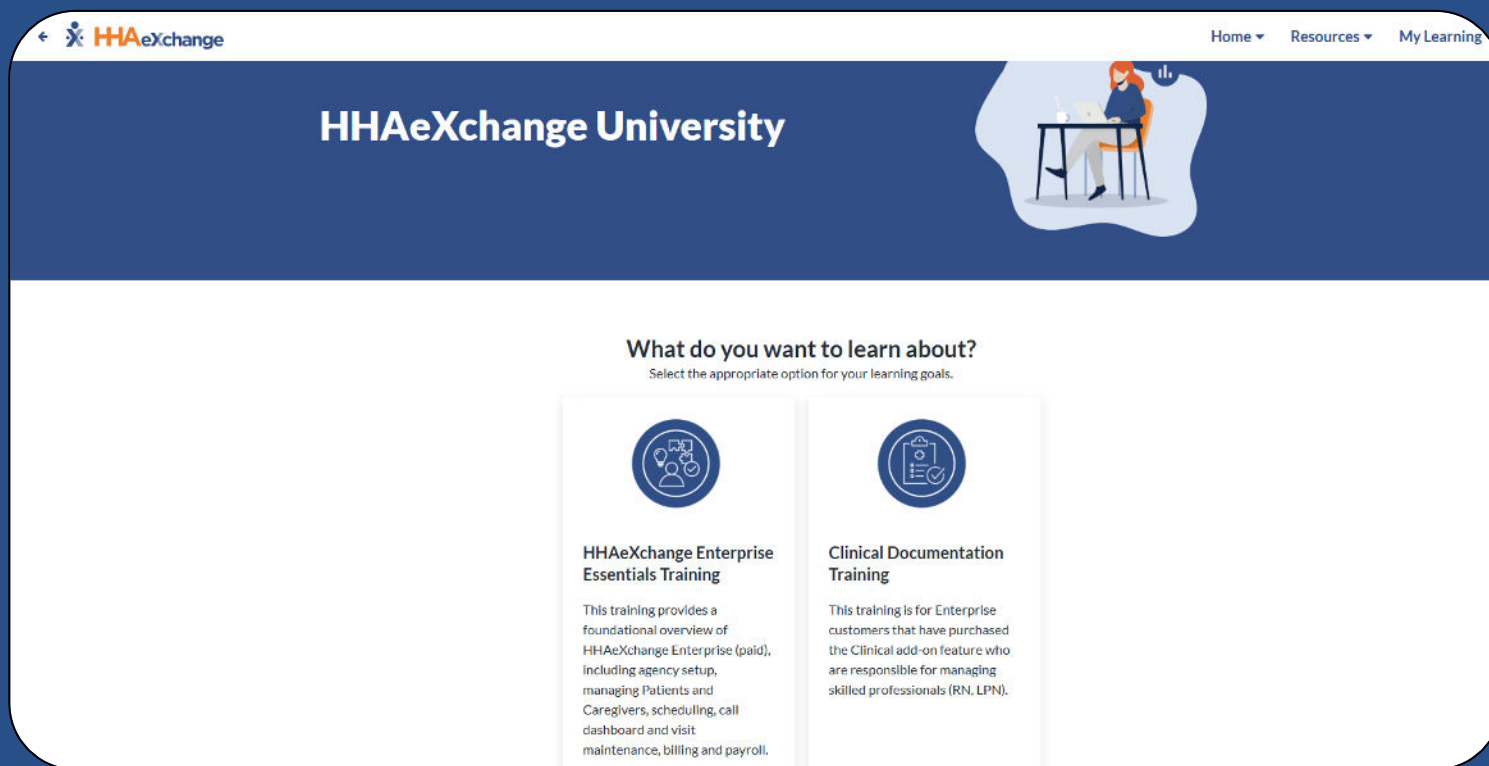
- Linked contracts and reviewed in the contract setup.
- Make sure pending placements are sent to the correct office.
- Internal and linked patient profiles should be merged.
- Schedules and Master Weeks should be updated to reflect the new linked contract.
- Use List of Patients, and Placement reports to manage new placements.
- IDOA linked contracts and Patients should be updated with PSA & CCU information.



Resources

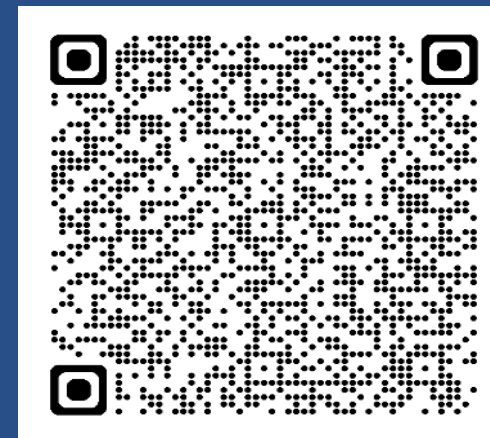


New Onboarding Program Available!



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

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



<https://university.hhaexchange.com>

HHAEExchange University Sign In

HHAEExchange University credentials are not the same as platform credentials.

Don't have an account? [Create one here.](#)

Work Email

Password

Sign In

[Forgot Password?](#)

HHaEXchange Knowledge Bases!

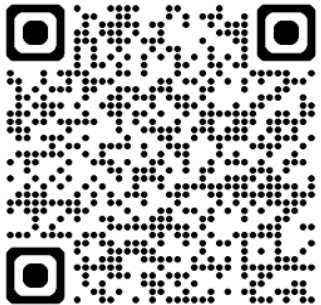


What best describes you?

- 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)

Providers have access to our new knowledge bases.

- Provider can learn how to use our system.
- Caregivers can learn how to use our EVV tools.
- Review troubleshooting information.
- Use Caree our new Virtual assistant!



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



Resources

Getting Started

- [Contract Search](#)
- [Patient Placement](#)
- [Office Move](#)
- [Patient Merge](#)

Scheduling

- [Manage Schedules and Master Week](#)

PSA & CCU

- [IL PSA & CCU IDOA contract setup](#)
- [IL – Apply PSA CCU to Patient Contract](#)
- [IDOA PSA CCU Maps](#)

Reports

- [List of Patients ENT report](#)
- [Patient placement reports](#)

Mark Your Calendars!



Visit the HHAeXchange Customer Events Page

- Register for upcoming live trainings and webinars tailored to your agency
- Find sessions on EVV, mobile app, scheduling, billing, reporting, and more
- Get expert tips, real-time answers, and practical takeaways to boost efficiency



[Customer Training Events:
Elevate Your Skills | HHAeXchange](#)

The screenshot shows the HHAeXchange website's 'Upcoming Customer Events' page. At the top left is the HHAeXchange logo. The main heading is 'Upcoming HHAeXchange Customer Events'. Below this is a sub-heading: 'We look forward to seeing you at one of our customer training webinars or in-person training events.' There are search and filter options. Three event cards are displayed: 1) 'EVV Made Simple: How to Stay Compliant Every Day' on Tuesday, January 13 at 1PM ET, with an image of people in a meeting. 2) 'Minnesota EVV Readiness Bootcamp' on January 27th or 28th, 2026, with an image of a man and a woman reviewing documents. 3) 'Post Go-Live Training + Office Hours: Admin Setup' as a live training on February 2nd at 2PM ET and office hours on February 4th at 2PM ET, with a large orange outline of a paperclip icon.



Questions?

**THANKS FOR
ATTENDING!**



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