

Our Webinar Will Begin Shortly

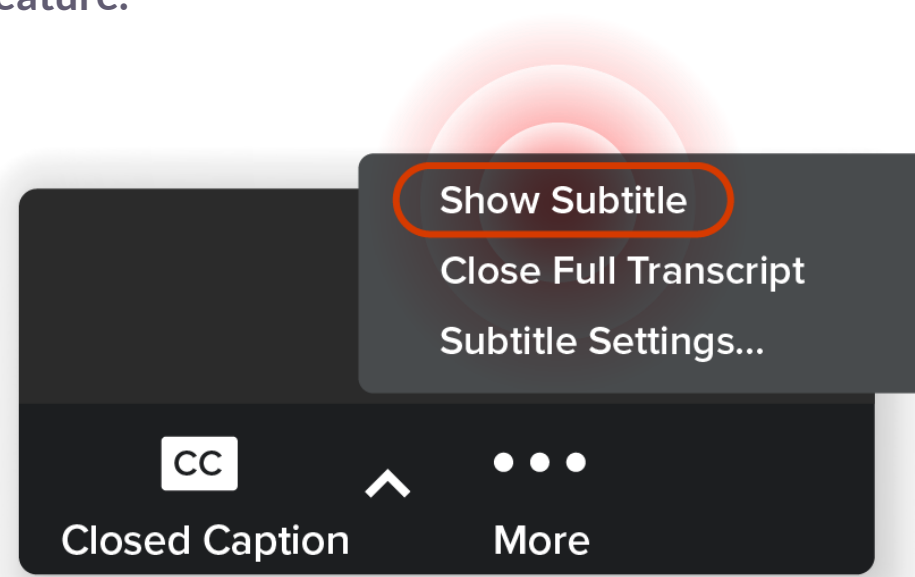
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Accessibility Options

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- This webinar is being recorded. We will email the recording and slides after the session.
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- Q&A at the end. Please submit your questions in the Q&A box.
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IL DRS & DOA Phase 3: Visit Maintenance

March 2026

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Meet the Presenter

Ashley Cho



- **Role:** Senior Training Specialist
- **Tenure at HHAeXchange:** 4 Years
- **Areas of Expertise:** Billing, Revenue Cycle



Visit Maintenance



What This Training Covers:

This session provides an end-to-end walkthrough of the Visit Maintenance feature and workflows in HHAeXchange that support accurate EVV and smooth daily operations, including:

- Visit maintenance
- Resolving common EVV exceptions

Who Should Attend?

- Agency staff who manage caregiver visits in HHAeXchange, such as coordinators and admins.

Poll: Payer Sponsored Provider



Have you completed the following?

- Logged into the HHAeXchange+ mobile app
- Confirmed caregivers are successfully clocking in and out using an approved EVV method

A. Yes

B. No

IL DRS & DoA EVV Operations
Setup: EVV & Visit Capture



[Recording of webinar](#)

Scan the QR Code above with
your phone

Objectives of Today's Training

You will be able to:

- **Navigate** the Visit Maintenance interface, including key tabs and tools
- **Identify** completed visits versus visits with exceptions
- **Resolve** common EVV and visit exceptions





Agenda



EVV Overview



Key Takeaways



Visit Maintenance Overview



Support Resources



Visit Maintenance



Questions



Visit Verification

Knowledge Checks

You'll see these throughout the presentation!



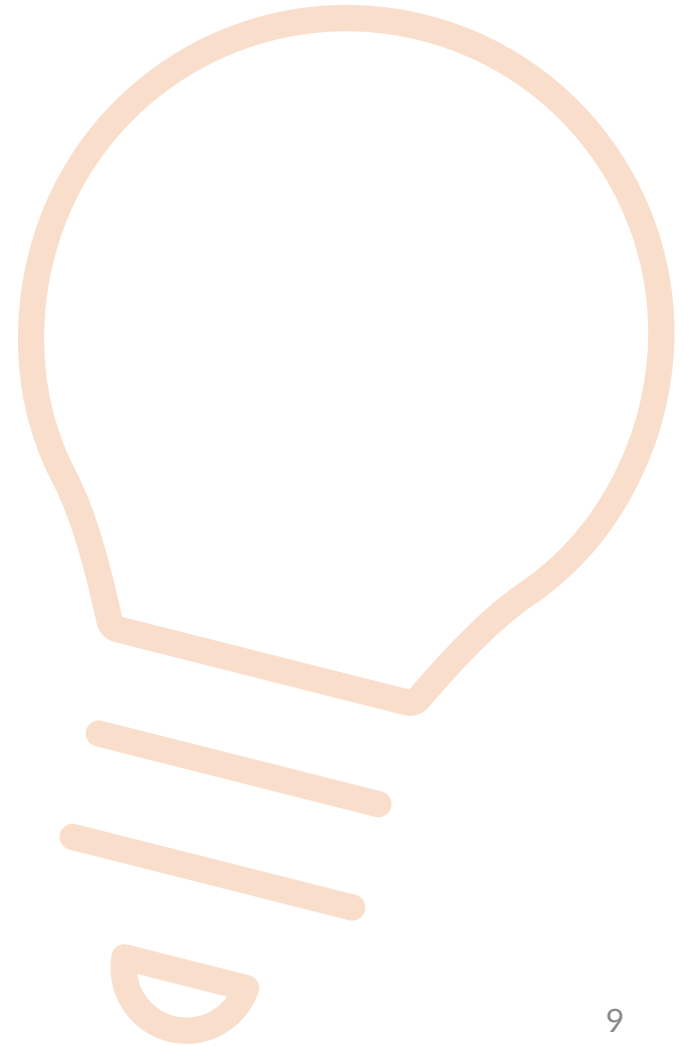
What's the name of the presenter of this webinar?

A. Teavy

B. Ashley

C. Shanieka

D. George



EVV Overview

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EVV Tracker



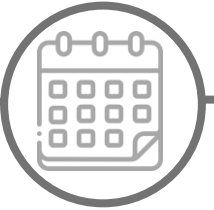
AGENCY
CONFIGURATION



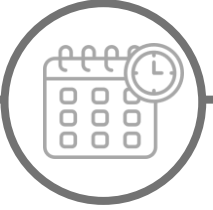
CAREGIVER
MANAGEMENT



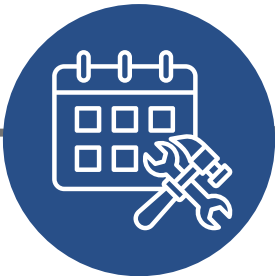
PATIENT
MANAGEMENT



SCHEDULING



VISIT CAPTURE



**VISIT
VERIFICATION
&
MAINTENANCE**



REPORTING
&
COMPLIANCE
MONITORING

6 Elements of a Cures Compliant Visit



Who

Patient



Who

Caregiver



What

Type of
Service



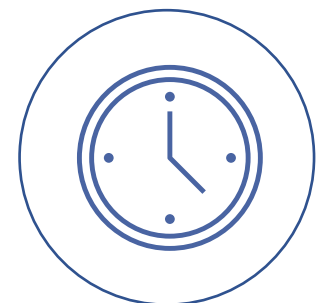
Where

Location
of Service



When

Date of
Service



When

Time of
Service

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 		

Visit Maintenance Overview

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Visit Maintenance Overview



What is it?

- Visit Maintenance centralizes all visit activity, so agencies do not need to chase issues across multiple screens. It provides visibility into visit status, EVV linkage, and exceptions in one place.

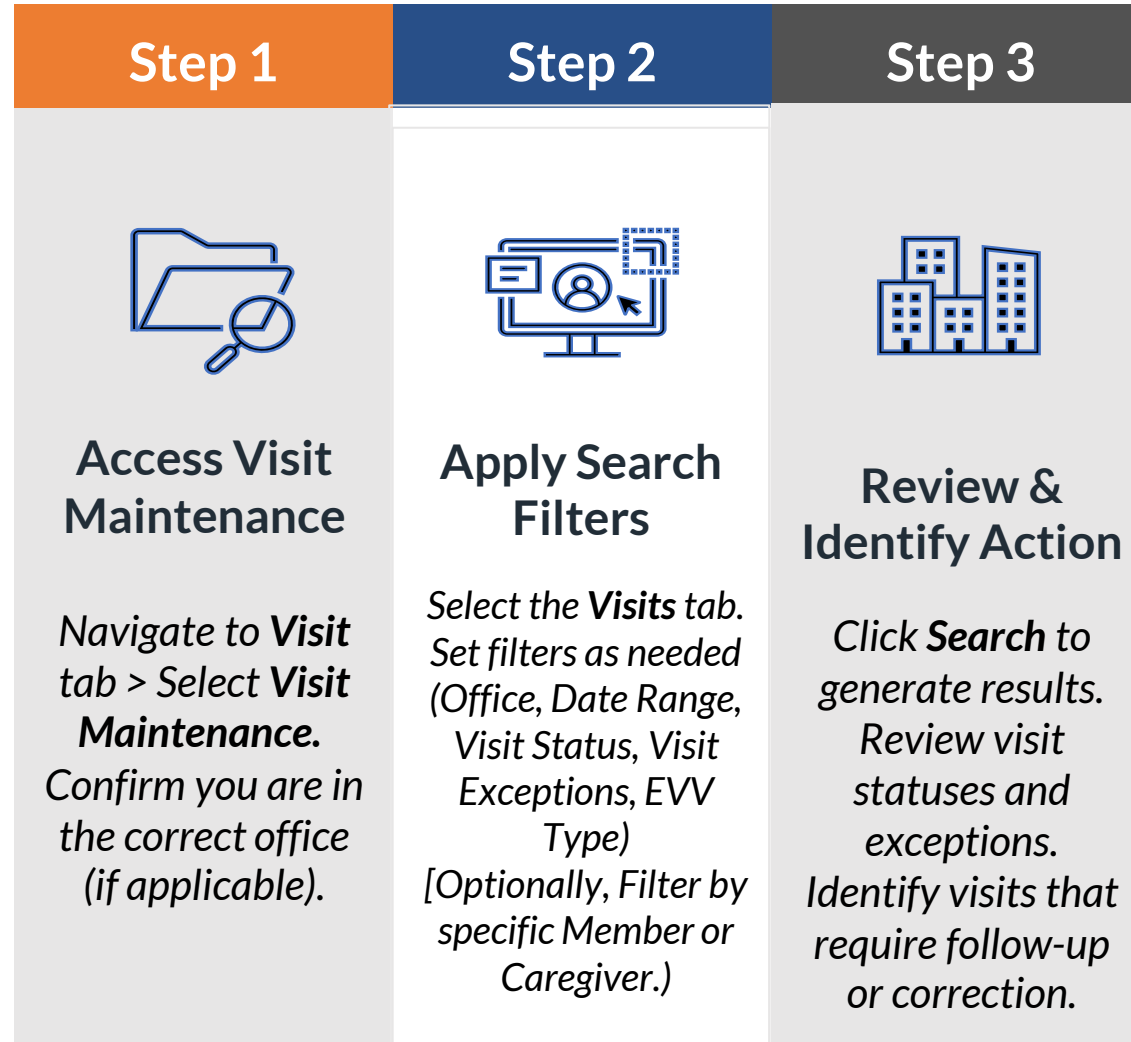
Why does it matter?

- Visit Maintenance let's us:
 - Review completed visits.
 - Resolve EVV and Prebilling exceptions.
 - Link EVV to visits seamlessly.
 - View visit authorizations and details.

The screenshot displays the HHAexchange Visit Maintenance interface. At the top, there are navigation tabs for 'Visits', 'Unscheduled Services', and 'EVV Attempts'. Below this, there are search filters for 'Office' (UMA MI office, UMA health care training), 'Date Range' (05/01/2025 to 05/05/2025), 'Visit Status' (Select one or more), and 'Visit Exceptions' (Incomplete Confirmation). A 'Search' button is visible. Below the filters, a table lists visits with the following columns: Date/Schedule, Visit Time, Patient ID, Caregiver ID, Visit Status, Visit Exceptions, and Auth/Bill Info. The table contains several rows of visit data, including dates like 05/05/2025 and 05/02/2025, and various visit statuses such as 'Scheduled' and 'Incomplete'.

Date/Schedule	Visit Time	Patient ID	Caregiver ID	Visit Status	Visit Exceptions	Auth/Bill Info	Actions
05/05/2025 (DF) 08:00 PM - 10:00 PM 2h 00m	Start: --:-- End: --:-- Duration: --	Lee, Walter Admin. ID: KHC-90005	Lopez, Maria Code: KHC-1003 Asst. ID: 100003	Scheduled	• Caregiver Compliance • Incomplete Confirmation • Missing Services Portal Approval	Life Care Demo Payer (KHC) 55130 765757	...
05/05/2025 (DF) 12:00 PM - 01:00 PM 1h 00m	Start: --:-- End: --:-- Duration: --	Lee, Walter Admin. ID: KHC-90005	Shah2, Samir Code: KHC-1006 Asst. ID: 100006	Scheduled	• Caregiver Compliance • Incomplete Confirmation	Life Care Demo Payer (KHC) T1019 324324342	...
05/05/2025 (DF) 08:00 AM - 09:00 AM 1h 00m	Start: --:-- End: --:-- Duration: --	Lee, Walter Admin. ID: KHC-90005	Freeman, Jane Code: UMA-1008 Asst. ID: 100008	Incomplete	• Caregiver Compliance • Incomplete Confirmation • Missing Services Portal Approval	Life Care Demo Payer (KHC) 55130 765757	...
05/05/2025 (DV) 2h 00m	Start: --:-- End: --:-- Duration: --	Lee, Walter Admin. ID: KHC-90005	Caregiver, Jimmy Code: KHC-1010 Asst. ID: 100010	Scheduled	• Caregiver Compliance • Incomplete Confirmation	Life Care Demo Payer (KHC) T1019 324324342	...
05/02/2025 (DF) 08:00 PM - 09:00 PM 1h 00m	Start: --:-- End: --:-- Duration: --	Lee, Walter Admin. ID: KHC-90005	Lopez, Maria Code: KHC-1003 Asst. ID: 100003	Incomplete	• Caregiver Compliance • Incomplete Confirmation • Missing Services Portal Approval	Life Care Demo Payer (KHC) 55130 765757	...
05/02/2025 (DF) 12:00 PM - 01:00 PM	Start: --:-- End: --:-- Duration: --	Lee, Walter Admin. ID: KHC-90005	Shah2, Samir Code: KHC-1006	Incomplete	• Caregiver Compliance • Incomplete Confirmation	Life Care Demo Payer (KHC) T1019 324324342	...

Visit Maintenance: Visit Search Workflow



Note: The Visit tab allows you to search and filter visits by exception and EVV type to quickly identify visits needing attention.

Visit Maintenance: Visit Search



Visit Maintenance

Visits | **Unscheduled Services** | EVV Attempts

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

Office * UMA MI office x UMA health care training x UMA healthcare x

Date Range * 01/09/2026 - 01/09/2026

Visit Status Select one or more

Visit Exceptions Select one or more

Advanced Filters

Patient

Caregiver

Coordinator Select one or more

Contract Select one or more

Schedule Type Select one or more

EVV Type Select one or more

EVV Exceptions Select one or more

Discipline Select one or more

Search **Reset**

How to complete a Visit Search

1. Navigate to the **Visit** tab > Select **Visit Maintenance** from the dropdown.
2. Select **Visits** > Set search filters as needed
3. Select **Search** to view results
(The Visit tab allows you to search and filter visits based on exceptions and EVV type.)

Filters Include

- Scheduled visits
- In progress visits
- Visits missing clock ins
- Completed visits
- Incomplete visits

Actions Include

- Review Visit details
- Review Patient details
- Review Caregiver details
- Delete Visits

Hello georgem

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

Placements

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

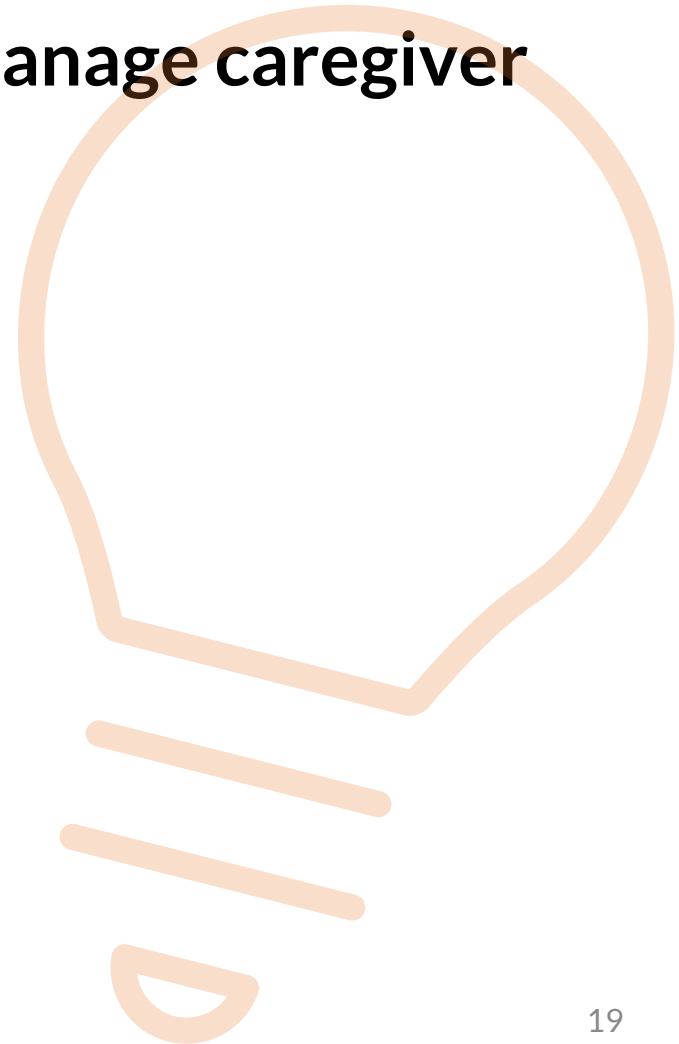
Patient	Admission ID	Office	Start Date	Stop Date	Frequency	Service Category	Service Type	Request Sent At	Status	Cut Off Time	Contract Name
XXXXX	5141341354	UMA healthcare	11/12/2024			Home Health	PCA	11/11/2024 12:41:42 PM	Pending	11/16/2043 11:20:42 PM	Life Care Demo Payer

Knowledge Check - Navigation



Where do you navigate in the portal to review and manage caregiver visits?

- A. Reports > EVV Compliance
- B. Admin > Agency Profile
- C. Visit > Visit Maintenance**
- D. Billing > Claims Management

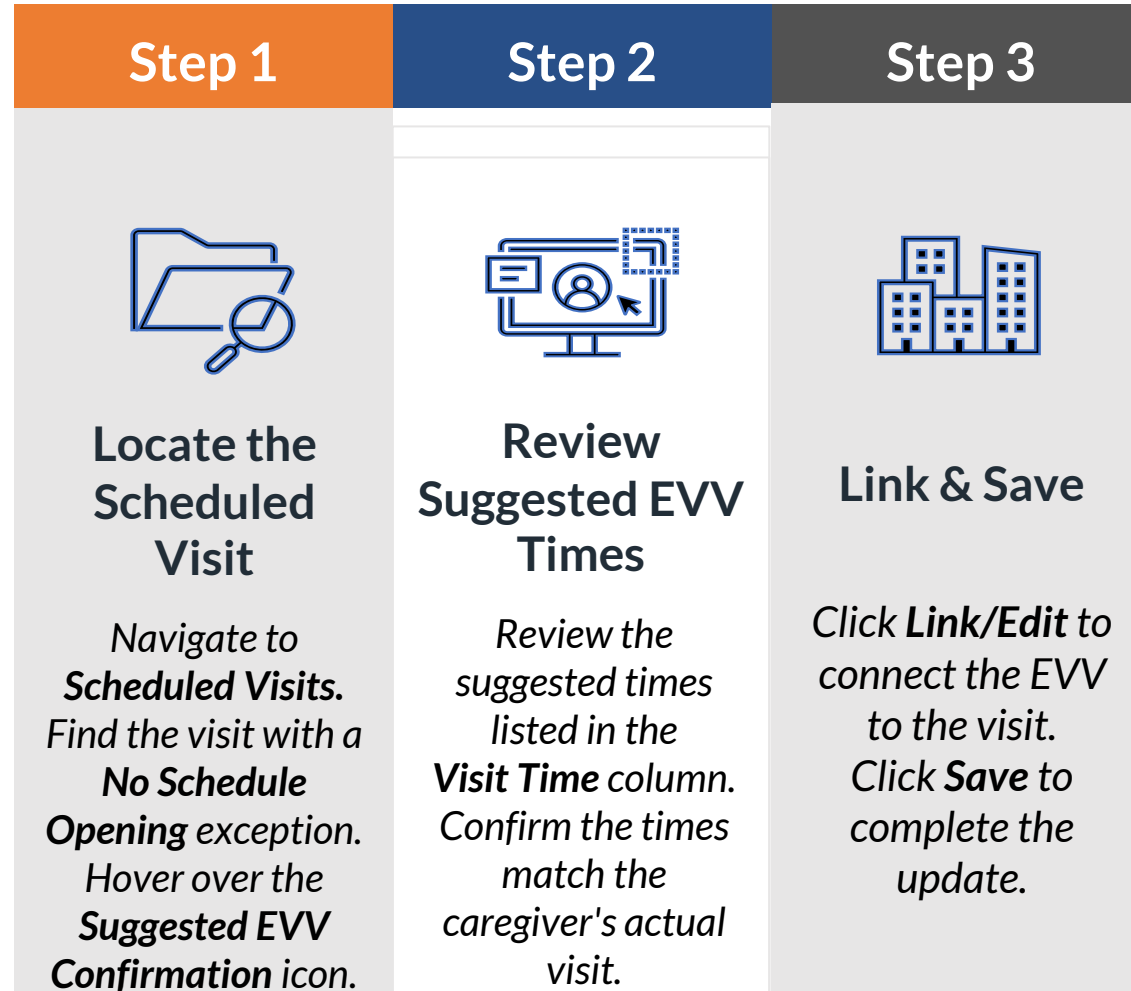


Visit Maintenance

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Visit Maintenance: Linking EVV (No Schedule Opening) Workflow



Note: EVV linking will **NOT** place you out of compliance.

Hello PEdemoAC

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

Placements

- Pending (0)**
- Accepted with Temp Caregiver (9)
- Staffed (0)
- Accepted with No Master Week(0)

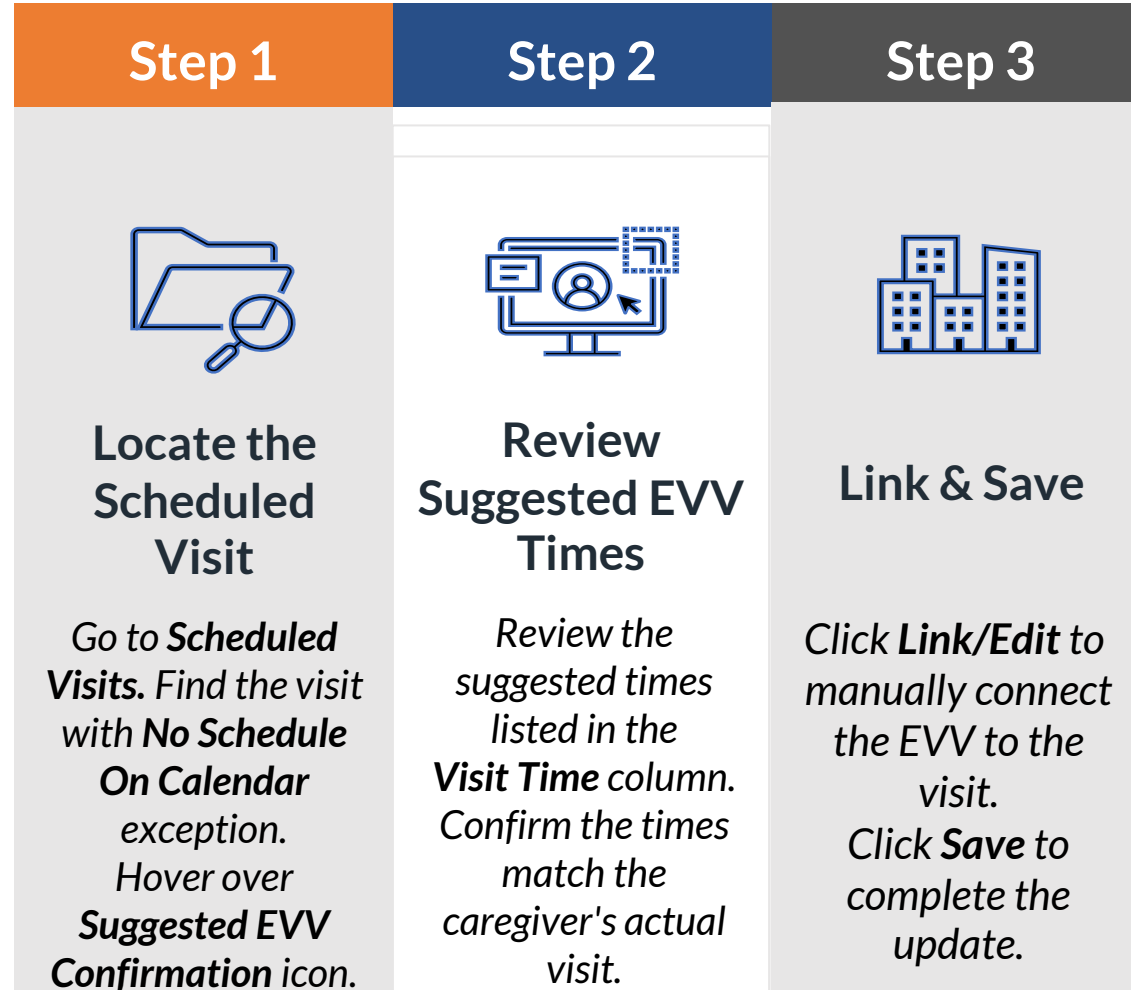
Patient	Admission ID	Office	Start Date	Stop Date	Frequency	Service Category	Service Type	Request Sent At	Status	Cut Off Time	Payer Name
---------	--------------	--------	------------	-----------	-----------	------------------	--------------	-----------------	--------	--------------	------------

No data available in table





Visit Maintenance: Linking EVV (No Schedule On Calendar) Workflow



Note: Linking EVV ensures the visit is validated and exception-free

Visit Maintenance

Presentation last saved: Just now

Visits **Unscheduled Services** EVV Attempts

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

Office *

UMA healthcare x UMA health care training x
 UMA MI office x

Date Range *

04/01/2025 - 05/06/2025

Visit Status

Select one or more

Visit Exceptions

Select one or more

> Advanced Filters

Search Reset

Visits

Legend: ✔ Auto-Linked | ▲ EVV Exception | ✍ Manually entered time | 🔗 Suggested EVV confirmation | ✍ Time requires manual entry [View All](#)

Office: **UMA healthcare** **UMA health care training** 1 more Date Range: **04/01/2025 - 05/06/2025** Visit Status: **Completed** Caregiver: **Zidane, Barbara [KHC-1106]**

Date/Schedule	Visit Time	Patient	Caregiver	Visit Status	Visit Exceptions	Auth/Bill Info	Actions
05/01/2025 (NS) 0h 30m	Start: 10:45 AM ▲ End: 11:00 AM ▲ Duration: 0h 15m	Grey, Lexie Admsn. ID: KHC-900103	Zidane, Barbara Code: KHC-1106 Assmt. ID: 100106	Completed	• Caregiver Compliance	Life Care Demo Payer (KHC) T1019 👍 697415456144	...
04/24/2025 (DF) 03:00 PM - 03:15 PM 0h 15m	Start: 03:00 PM ✔ End: 03:15 PM ✔ Duration: 0h 15m	Grey, Lexie Admsn. ID: KHC-900103	Zidane, Barbara Code: KHC-1106 Assmt. ID: 100106	Completed		Life Care Demo Payer (KHC) T1019 👍 697415456144	...
04/24/2025 (NS) 0h 30m	Start: 01:45 PM ✔ End: 02:15 PM ✔ Duration: 0h 30m	Grey, Lexie Admsn. ID: KHC-900103	Zidane, Barbara Code: KHC-1106 Assmt. ID: 100106	Completed		Life Care Demo Payer (KHC) T1019 👍 697415456144	...

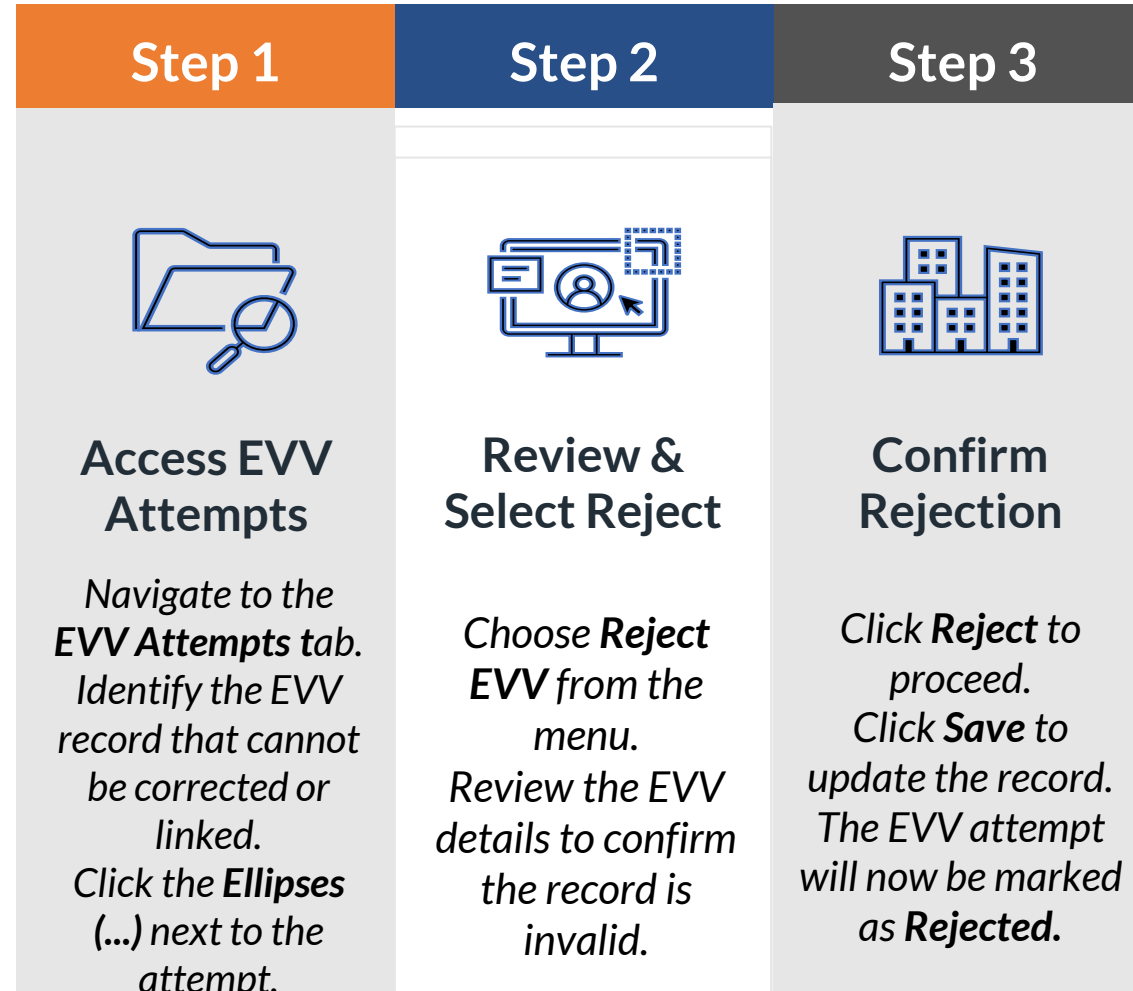
Knowledge Check- "No Schedule Opening"



You see a visit with a Suggested EVV Confirmation icon due to a "No Schedule Opening" exception. What should you do?

- A. Review the suggested EVV times and click Link/Edit to connect the EVV to the correct visit
- B. Delete the scheduled visit and recreate it
- C. Ignore the alert — it will resolve automatically overnight
- D. Submit the visit for billing immediately

Rejecting EVV Attempts Workflow



Note: Rejecting invalid EVV attempts maintains accurate records and prevents clutter.



Visit Maintenance

Visits **Unscheduled Services** EVV Attempts

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

Office *

- UMA MI office x
- UMA health care training x
- UMA healthcare x

Date Range *

03/06/2026 - 03/06/2026

Visit Status

Select one or more

Visit Exceptions

Select one or more

> Advanced Filters

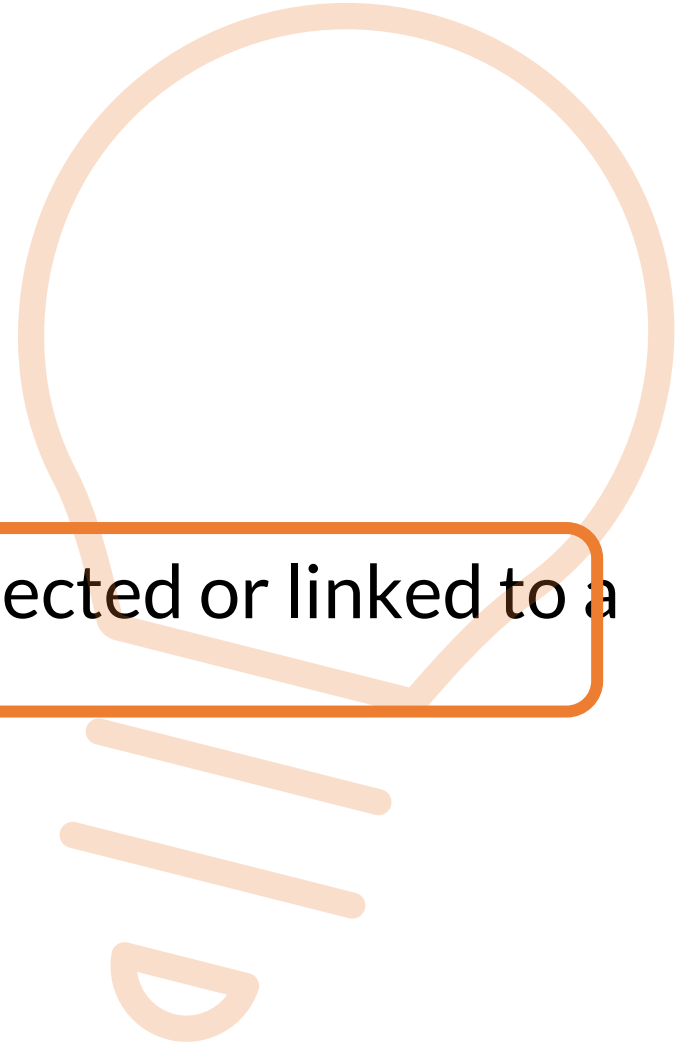
Search Reset

Knowledge Check- EVV Attempt



When should you reject an EVV attempt?

- A. When the caregiver clocked in on time
- B. When the visit is already marked complete
- C. When you want to manually adjust payroll
- D. When the EVV record is invalid and cannot be corrected or linked to a visit**



Visit Verification

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Visit Verification: Scheduled Visits Workflow



Note: Visit Verification allows you to confirm visit details and proactively resolve exceptions.

Hello PEdemoAC

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



Visit Verification: Unscheduled Visits Workflow



Note: Monitoring Unscheduled Services helps prevent missed visits and ensures accurate visit creation.

Visit Maintenance

Visits **Unscheduled Services** EVV Attempts

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

Office *

UMA healthcare x UMA health care training x
UMA MI office x UMA Botville x

Date Range *

01/13/2026 - 01/13/2026

Visit Status

Select one or more

Visit Exceptions

Select one or more

> Advanced Filters

Search Reset



Key Takeaways

Key Takeaways



- Visit Maintenance brings visit management tasks in one place.
- Quickly link EVV to scheduled visits to ensure all visits are accounted for.
- Manually confirm visits when EVV is missing or invalid.
- Create visits from unscheduled EVV to avoid lost visit records



Resources

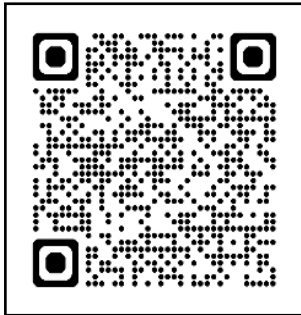


State Info Hub

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>

HHAExchange Homecare Software Technology Resources Company [Request Your Demo](#)

Illinois DOA & DRS Information Center

[Provider Enrollment Form](#)

TABLE OF CONTENTS

- OVERVIEW
- PARTICIPATE IN TRAINING
- UNDERSTANDING ALTERNATIVE EVV (EDI)
- SERVICES IN SCOPE
- NEED SUPPORT

WELCOME TO HHAEXCHANGE

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>



Third-Party EVV Integration (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



- [Visit Maintenance Feature](#)
- [Visit Maintenance Landing Page](#)
- [Visit Maintenance How-To Videos](#)
- [Edit GPS Coordinates](#)

Customer Portal:

- [Customer Portal](#)



Next steps



Next Steps



Continue daily monitoring of Visit Maintenance exceptions

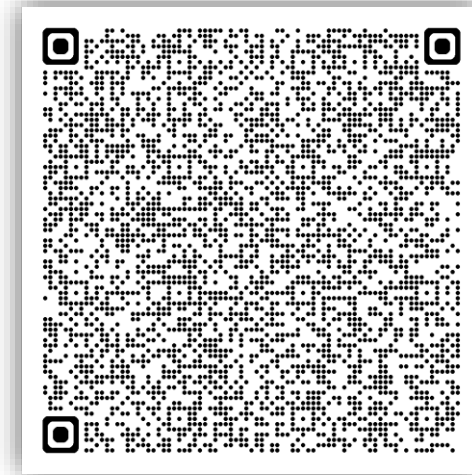


Begin tracking caregiver compliance trends



Attend the Phase 5: Compliance Monitoring webinar

IL DRS & DoA EVV Operations Setup: Compliance Monitoring



Webinar Registration - Zoom
[Register Here](#)
Tuesday, March 24 @ 2:00 PM
ET



Questions?



**Illinois DOA & DRS State
Info Hub**

**THANKS FOR
ATTENDING!**



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