



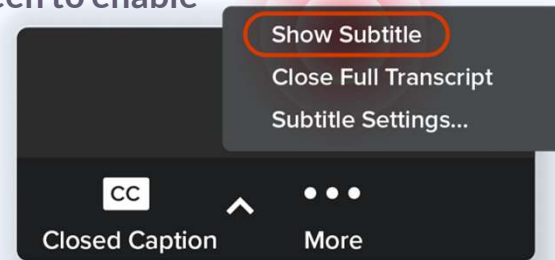
**Our Webinar Will
Begin Shortly**



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- This webinar is Closed Caption enabled.
- Please proceed by selecting the Closed Caption option at the bottom of your screen to enable feature.

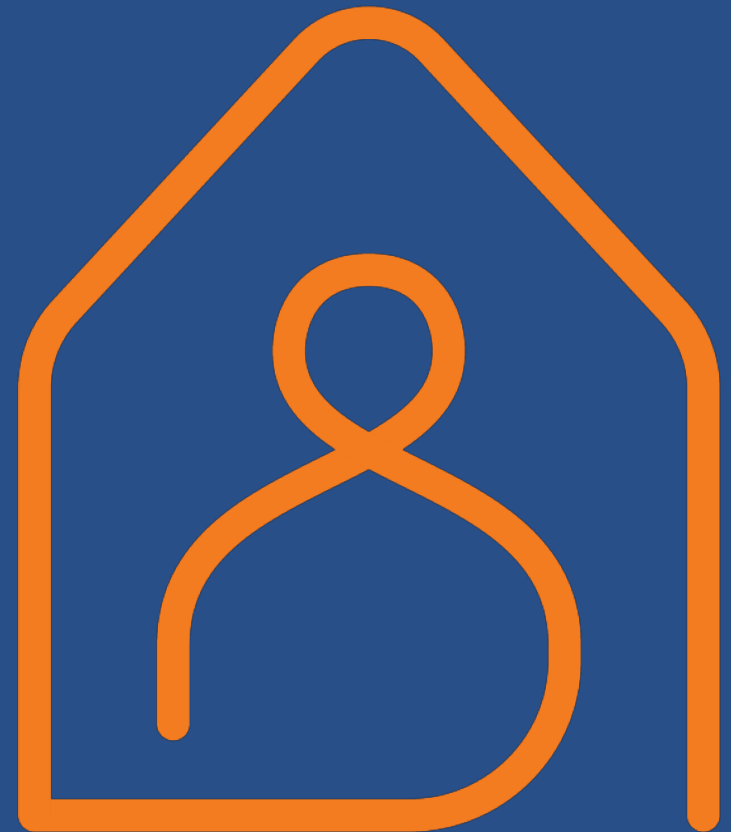


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MI FI/FMS EVV System Setup & Readiness Training

March 10, 2026



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speakers



Meet 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.

MI FMS Services Portal

Overview

What this training covers:

This training will provide FI/FMS Providers and Designated Representatives the tools and knowledge they need to ensure Electronic Visit Verification (EVV) compliance for their Employees using the HHAeXchange Services Portal. The Services Portal is a website used to meet EVV requirements, understand system configuration and data flow, manage visit capture and maintenance, and utilize reporting tools to monitor compliance.

Who should take this training?

- Fiscal Intermediary (FI) & Financial Management Service Provider (FMS) that will need to create services portal users
- Any agency coordinators or trainers that will be training Self-Direction employees, employers, and Designated Representatives.

➤ Objectives of Today's Webinar

You will be able to:

- **Explain** the Michigan EVV workflow from Payer → FI/FMS → Employer/Caregiver/Beneficiary.
- **Understand** the relationship between the Provider Portal and the Services Portal.
- **Access** the HHAeXchange Services Portal manager and navigate key features.
- **Identify** Third-party EVV integration requirements and Services Portal impact.
- **Review and take action** on Self-Direction Employer shifts by approving, adjusting, or denying in the Services Portal.
- **Explain and demonstrate** approved EVV clock-in and clock-out methods used by Employees using the mobile app, IVR.



agenda



- Housekeeping
- Third-Party EVV Integration Requirements
- Provider Portal Overview
- Provider Portal Management
- Service Portal Overview
- Services Portal Navigation
- Visit Capture for Self-Direction Employees
- Key Takeaways
- Support Resources
- Questions

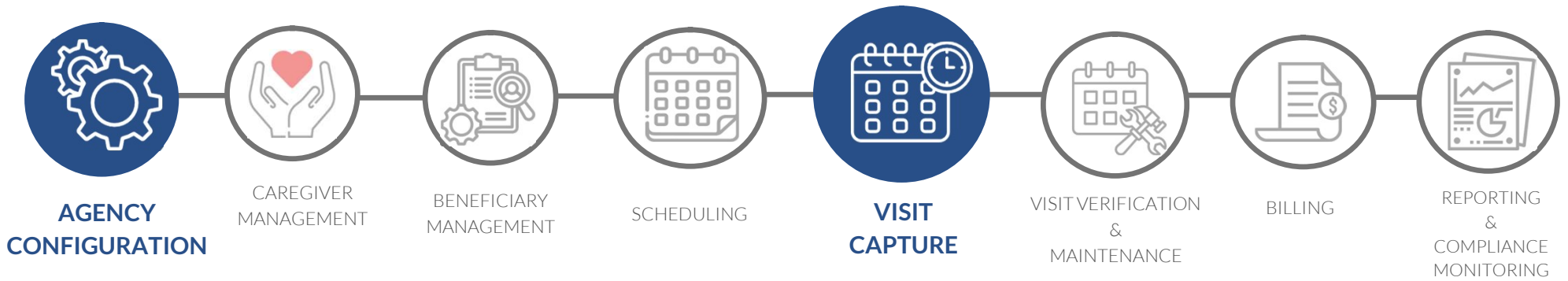


Housekeeping

EVV Overview



> EVV Overview



➤ 6 Elements of a Cures Compliant Visit



Who

Beneficiary



Who

Caregiver



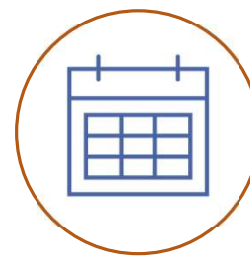
What

Type of
Service



Where

Location
of Service



When

Date of
Service

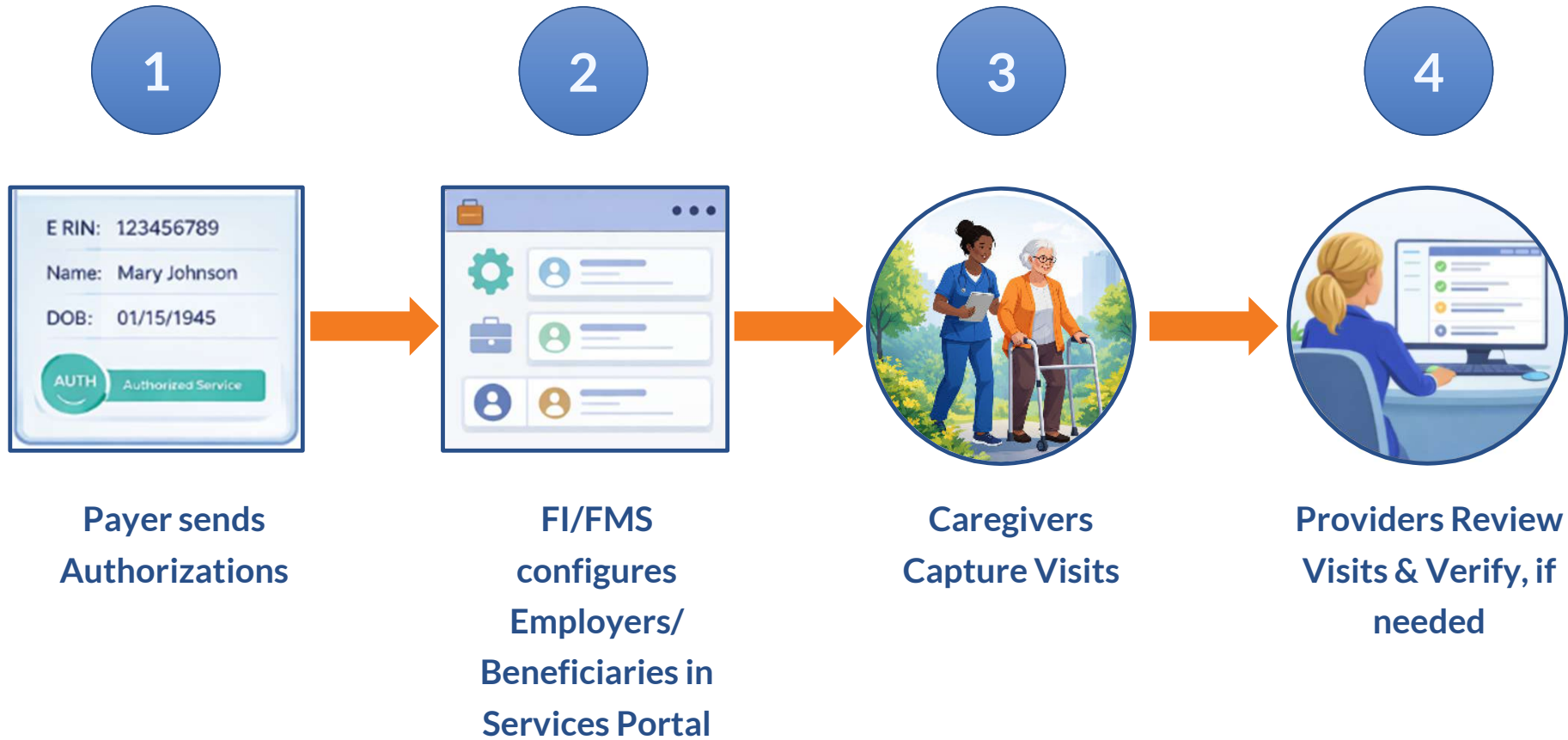


When

Time of
Service

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

Michigan Workflow



Knowledge Check

You'll see these throughout the presentation!

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

A. William

B. Shanika

C. George

D. Ashley



Third-Party EVV (EDI) Integration Requirements

➤ Third-Party EVV (EDI) Integration Requirements

Integration Requirements:

1. Complete the Third-Party EVV Attestation Form
2. Comply with the HHAeXchange Technical Specifications & Business Requirements
 - [EDI Technical Specifications](#)
 - [Business Requirements](#)
3. Review Authorization Specifications (if applicable – Home Health Only)
4. Submit an EDI Ticket

Visit: <https://www.hhaexchange.com/info-hub/michigan-information-center>

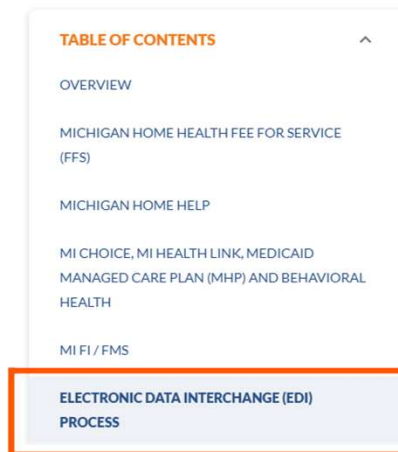


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MICHIGAN HOME HEALTH FEE FOR SERVICE (FFS)	
MICHIGAN HOME HELP	
MI CHOICE, MI HEALTH LINK, MEDICAID MANAGED CARE PLAN (MHP) AND BEHAVIORAL HEALTH	
MI FI / FMS	
ELECTRONIC DATA INTERCHANGE (EDI) PROCESS	

Electronic Data Interchange (EDI) Overview (Integrating with a 3rd Party Agency Management System)

This overview is geared towards providers who will be using their own EVV solution and not the MDHHS EVV solution. If you have your own EVV vendor, in HHAeXchange's system the vendor will be referred to as an EDI vendor. The information below lists the general requirements and steps to successfully integrate a 3rd Party Agency Management System with HHAeXchange. Electronic Data Interchange (EDI) Providers will be required to comply with both the HHAeXchange Technical Specifications and Business Requirements listed below. After reviewing the specifications and requirements resources, please initiate contact HHAeXchange to begin the integration process.

1. It is critical to complete the Third Party EVV Attestation Form begin the process: [Attestation Form](#)
2. Please click here for the Technical Specification document: [EDI Technical Specifications](#)
3. Please click here for the Business Requirements document: [Business Requirements](#)
4. Please click here for the Authorization Specification: [Web Service API Guide](#) (Home Health only)
5. Submit a ticket to HHAX EDI via the Client Support Portal:

<https://www.hhaexchange.com/supportrequest>

Third-Party EVV Attestation Form

Scan the QR Code below to begin completing the form



Third Party EVV Attestation - Michigan

Third Party EVV Attestation - MI



I attest to these documents and have signed below in agreement to the data specs, checklist, and confirming attestation for my agency. If you have not already done so, please review the three documents listed below:

Page 1 Page 2

Provider Legal Name: *

Provider Tax ID: *

Provider NPI:

Provider Primary Point of Contact

Name: *

Email: *

Phone:

EVV Vendor Legal Name: *

EVV Vendor Primary Point of Contact:

Name: *

Email: *

Phone

Next >



Provider Portal Overview

Provider Portal Overview

Provider Portal

The Provider Portal is a website used by FI/FMS providers to manage employer & services portal user profiles, oversee EVV activity, and complete visit verification at the agency level.

- Used by MI FI/FMS providers & administrators and Designated Representatives for:
 - Adding new Services Portal Users
 - Agency-level EVV oversight
 - Visit verification (if Employer cannot approve)
 - Monitoring integrated (3rd party) EVV data submissions



Provider Portal Management

➤ Provider Portal Management

Provider Portal

To add a new Services Portal User:

- From the **Admin** dropdown > select **Services Portal Management** > choose **Services Portal User Management**
- Click **Add Services Portal User** button to add new users [Employers & Caregivers] to the portal.

The screenshot shows the HHAexchange user management interface. A modal window titled 'Create New Services Portal User' is open over the 'Users Management' page. The modal contains the following fields and options:

- Email Address ***: Text input field.
- First Name ***: Text input field.
- Last Name ***: Text input field.
- Status**: Dropdown menu with 'Active' selected.
- Program**: Dropdown menu with 'Michigan Standard Program' selected.
- Role ***: Dropdown menu with 'Select role' selected. The dropdown list is open, showing options: 'Select role', 'MI Standard Patient', 'MI Standard Caregiver', and 'MI Standard Representative'.

At the bottom of the modal are 'Cancel' and 'Save' buttons. The background page shows a search bar for users and an 'Add Services Portal User' button.



Services Portal Overview

Services Portal Overview

What is the Services Portal?

The Services Portal is a website used by Employers and users to meet EVV requirements, review, approve, or take action on caregiver EVV visits. understand system configuration and data flow, manage visit capture and maintenance, and utilize reporting tools to monitor compliance.

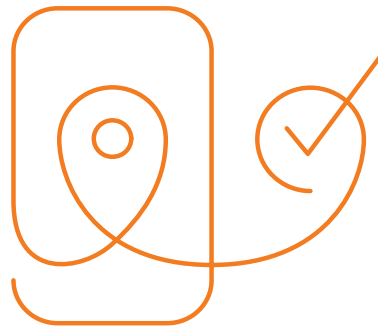
- Used by MI Employers for shift management, including:
 - Create shifts
 - Approve shifts
 - Adjust shifts
 - Deny shifts



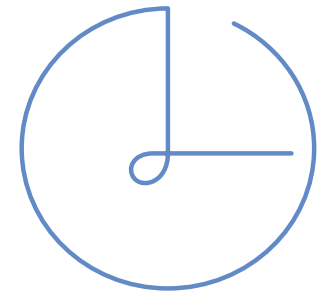
➤ The Connection



FI/FMS provides Services Portal Access to the Employers & Employees



Self-Direction Employees use EVV clock in and clock out methods to generate visits in Services Portal



Self-Direction Employers review shifts (visits) through the Services Portal

➤ Knowledge Check 1

How does the Provider Portal connect to the Services Portal?

- A. The Services Portal replaces the Provider Portal
- B. The two portals are unrelated
- C. Employers configure the Provider Portal directly
- D. FI/FMS providers use the Provider Portal to establish user access for Employers in the Services Portal



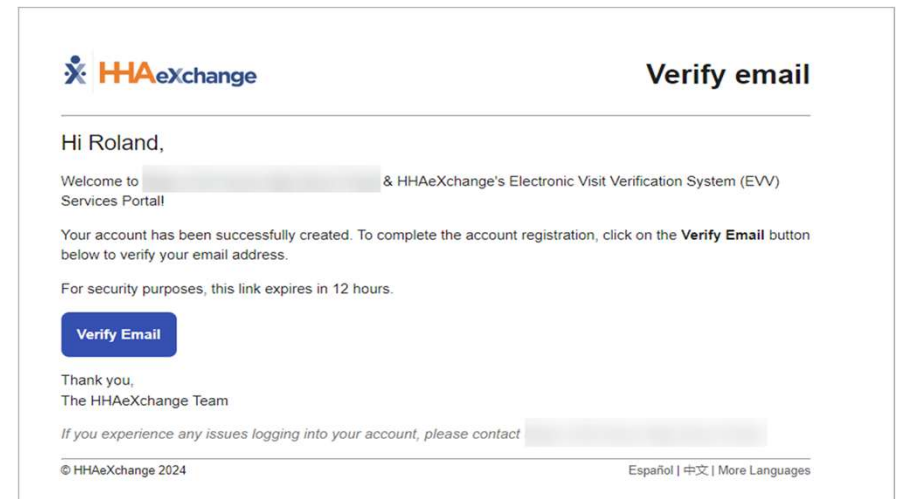
Services Portal Navigation

➤ Logging into the Services Portal

First, the FI/FMS providers create Services Portal access for the Employers & Caregivers.

Login Steps:

1. The Employer receives a credential email and sets a new password using the Services Portal link (bookmark):
 - <https://ucp.hhaexchange.com/login>
2. Click the **Verify Email** button from email.
3. Create new password.
4. Enter username and password into Services Portal.
5. Click **Log In**



Log in to your
HHAExchange
account.

[Español](#) | [中文](#) | 

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[Privacy Policy](#)  [Terms of Use](#) 



Email

wleucp@yahoo.com

Password

..... 

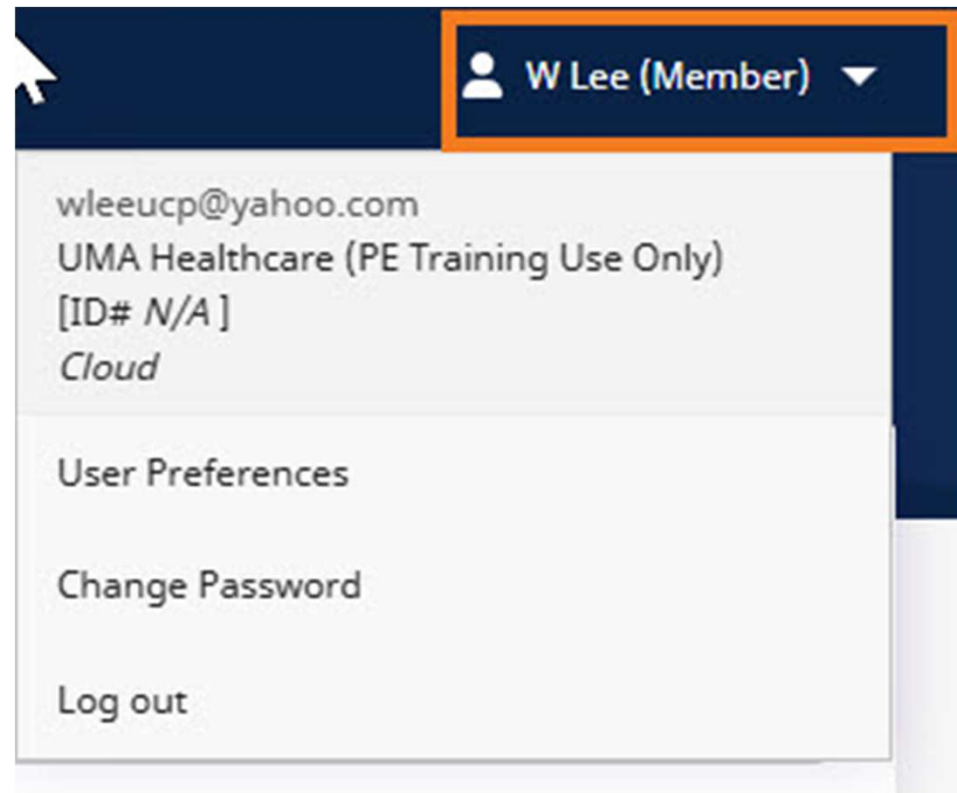
Log In

[Forgot Password?](#)

➤ Navigating the Services Portal

User Profile Menu

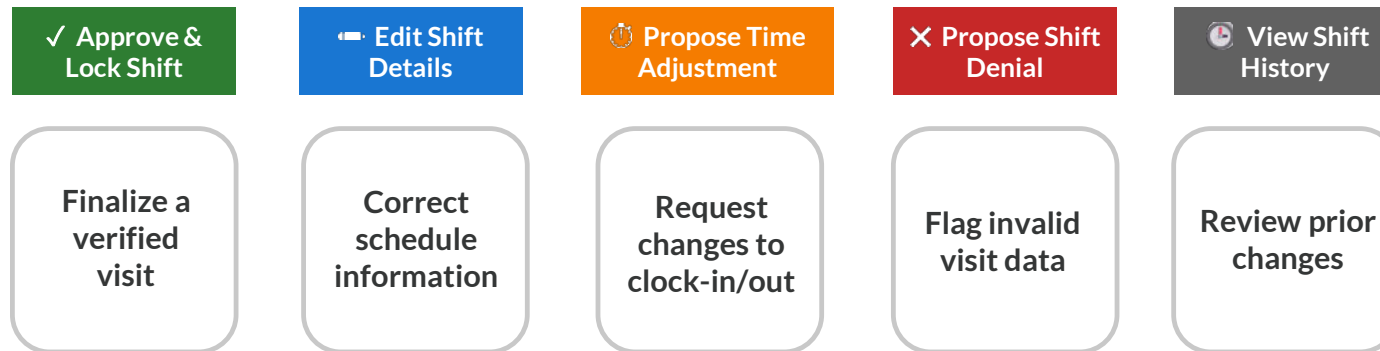
- Click the **User Profile** menu to:
 - Set keyword preferences
 - Update language
 - Change password



Shifts Overview

What is a Shift?

A shift is a scheduled period when a caregiver provides services to a MI beneficiary. It includes details like date, scheduled and confirmed time, service code, status, and actions you can take (such as approve or adjust).



Shifts

Search Shifts

Consumer Directed Services (CDS) Employer

Walter Lee x

Enter 1 or more characters to search by Name

Caregiver

Barbara Johnson x

Enter 1 or more characters to search by Name

Date Range

01/01/2026 - 01/15/2026

Limit range to 14 days

Shift Status

Select one or more

- Show shifts requiring action from me only
- Show shifts with linkable calls

Search Reset

Shifts

Add

Show

- All (0)
- Missing Call-In (0)
- Missing Call-Out (0)
- Missing Call-In & Call-Out (0)

Legend: Linkable to an EVV Confirmation | EVV Compliant | EVV non-compliant View All

Date	Caregiver	Scheduled Time	Confirmed Time	Scheduled / Confirmed Duration	Confirmed/Rounded Duration	Healthcare Common Procedure Coding System (HCPCS)	Authorization Status	Shift Status	Next Action Required From	Actions
------	-----------	----------------	----------------	--------------------------------	----------------------------	---	----------------------	--------------	---------------------------	---------

No Records

Knowledge Check 2

What is the primary purpose of the HHAeXchange Services Portal for Employers?

A. To review, manage, and take action on Employee Shifts and EVV visits

B. To replace EVV clock-in and clock-out methods

C. To create service authorizations for Self-Direction Employees

D. To submit claims and process payroll



Visit Capture for Self- Direction Employees

➤ Visit Capture Self-Direction Employees

EVV Clock-In & Clock-Out Overview for Self-Direction Employees

- EVV capture methods are approved ways caregivers record clock-in/clock-out of visits electronically to ensure compliance.

HHAEExchange+ Mobile App

- This capture method allows caregivers to capture EVV by clocking in and out directly from their mobile device at the Beneficiary's location.
- The preferred EVV capture method and helps ensure visits are recorded accurately using time and location data, reducing exceptions and manual corrections.

Interactive Voice Response (IVR)

- This method allows caregivers to capture EVV by calling a designated phone number from the beneficiary's IVR phoneline
- IVR provides an alternative EVV capture method when mobile devices are not used and helps ensure visits are recorded electronically.

➤ Visit Capture Methods: Self-Direction Employees



Mobile App

Preferred EVV Method

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



IVR

Alternative EVV Method

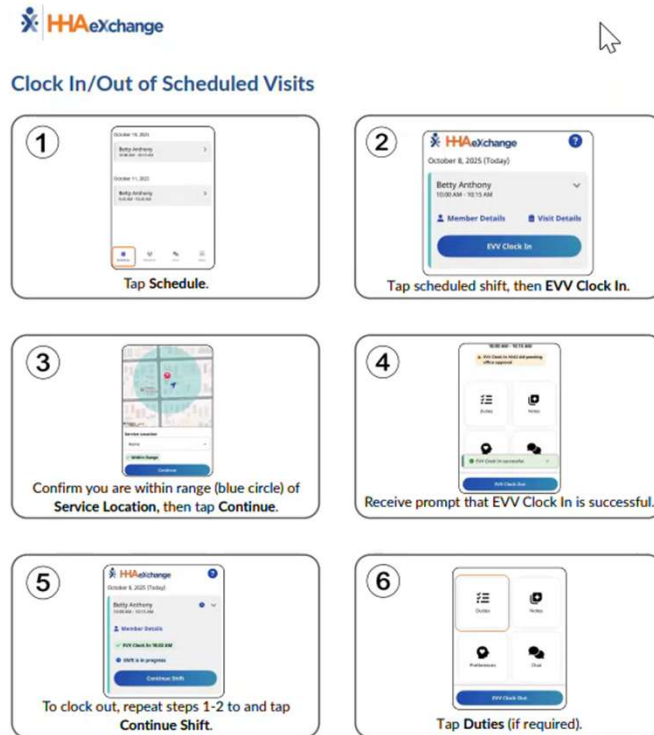
- ✓ Uses Beneficiary's home phone number
- ✓ Voice-based clock in/out

➤ Visit Capture: HHAeXchange+ Mobile App

Scenario:

The caregiver arrives at the Beneficiary'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.

[HHAeXchange+ Caregiver User Guide](#)





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**



HAexchange

➤ Mobile App Best Practices

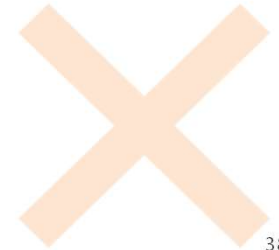
Best Practices

- Clocking in/out at the Beneficiary's location
- GPS matches the address
- Enter notification preferences
- Offline Mode used when needed
- Visit captured electronically



What Not To Do!

- Clocking in/out outside of the GPS tolerance range of a Beneficiary's home.
- GPS mismatch
- Missed clock-out with office edits
- Manual visit confirmation



➤ Visit Capture: Offline Mode

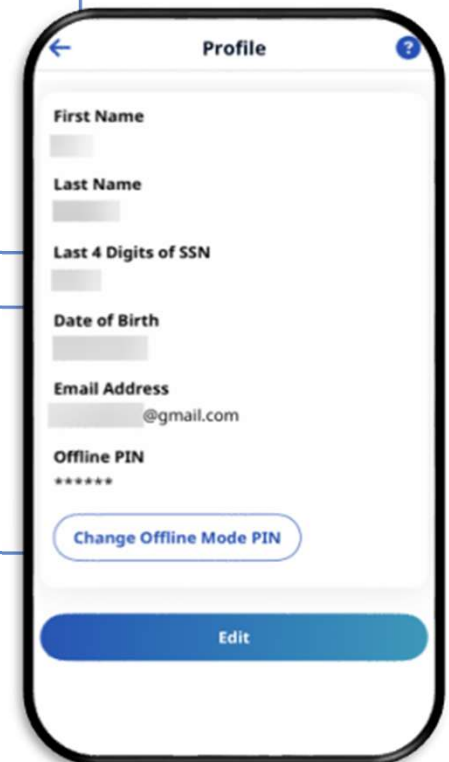
EVV Clock-In & Clock-Out in Offline Mode

- 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 **HHAeXchange+ Mobile App**

How to Use Offline Mode Pin:

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

Note: The Offline PIN is created by the CAREGIVER when first registering for the HHAeXchange+ mobile app.



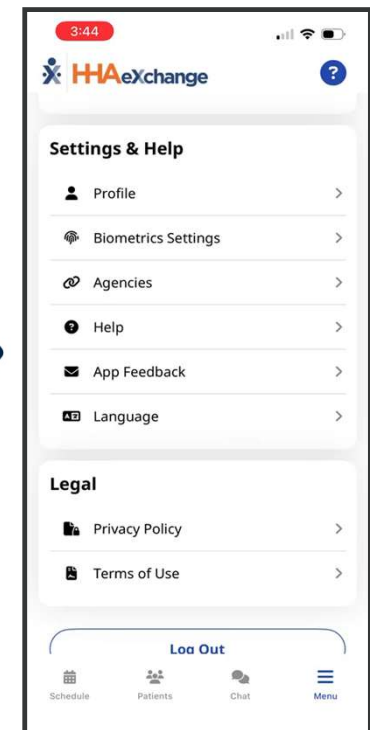
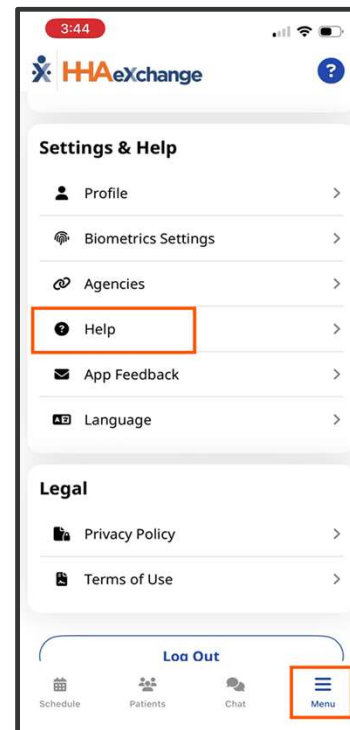


➤ Troubleshooting – Mobile App Help

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



➤ Visit Capture: IVR

Before calling, the Employee must have:

- HHAeXchange toll-free IVR number
- Employee Time & Attendance PIN
- Beneficiary's home phone number

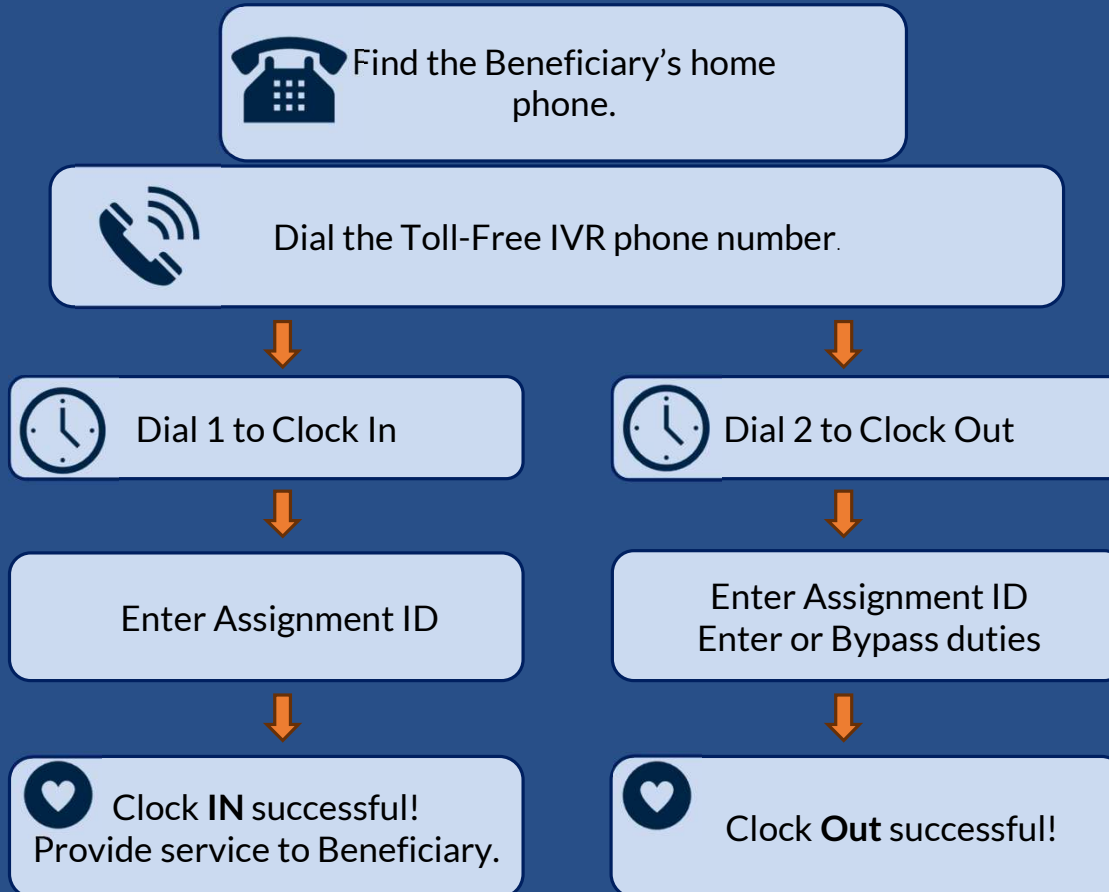
How to use IVR:

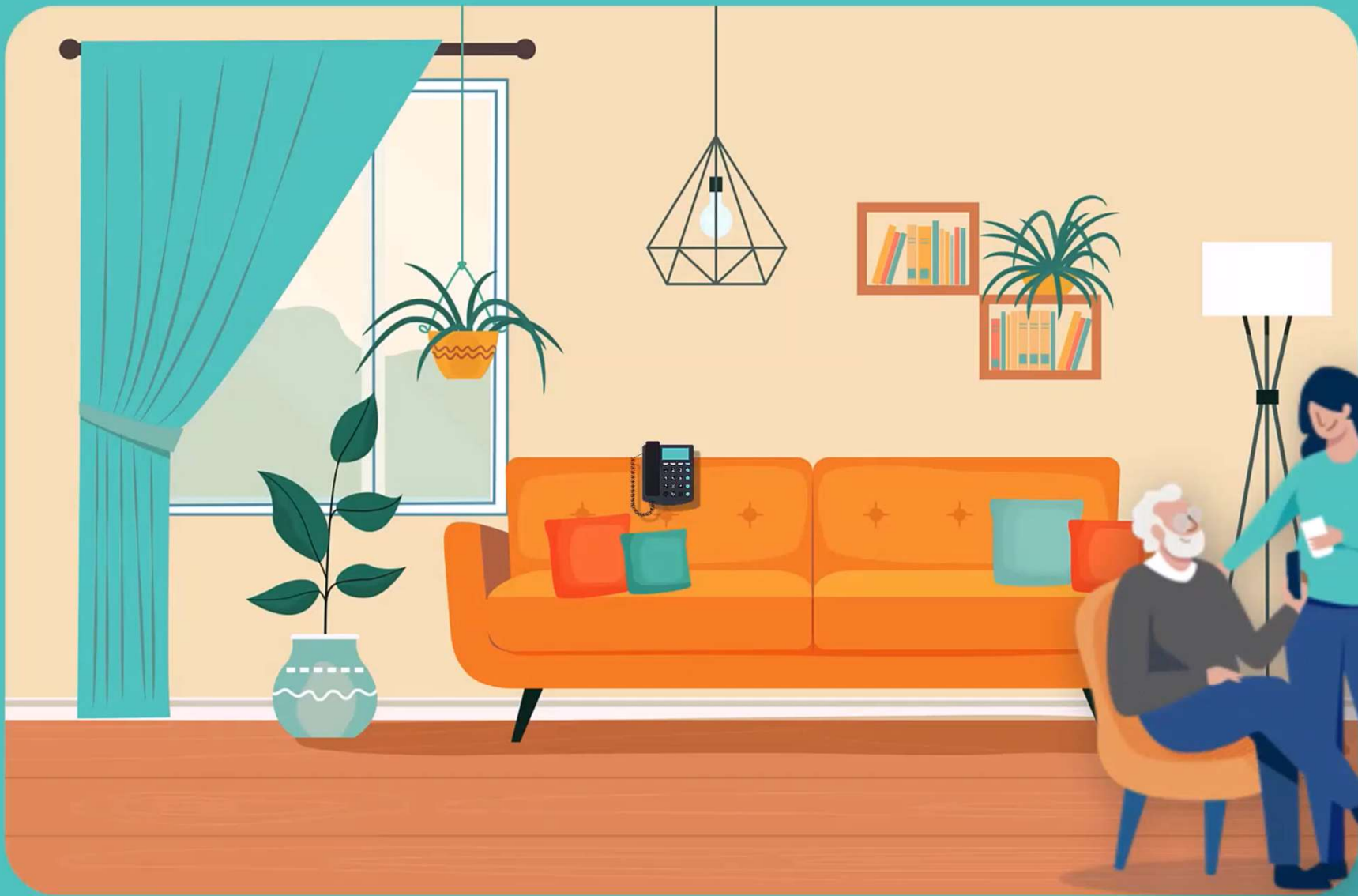
1. Go to the Beneficiary's home phone (IVR).
2. Dial the HHAeXchange toll-free number.
3. Listen for the "Welcome to HHAeXchange" greeting.
4. Follow the voice prompts:
 - Press **1** to Clock In & **2** to Clock Out
 - Enter your **Time & Attendance PIN** when prompted.
 - Enter the Assignment ID (if required).
 - Wait for the confirmation message that clock-in or clock-out was successful.



Visit Capture Overview

Home Phone IVR Number English & Spanish





➤ IVR Best Practices

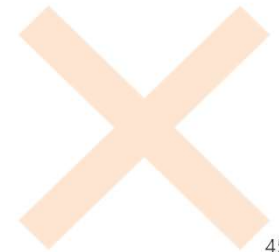
Best Practices

- Calling from the Beneficiary's assigned home phone in profile
- Using IVR Toll-free Number
- Entering the correct service provider (Caregiver) PIN or credentials
- Clocking in and clocking out at the correct time



What Not To Do!

- Calling from a phone that is not in the Beneficiary's profile
- Entering an incorrect PIN or service provider (Caregiver) credentials
- Forgetting to clock out and asking the office to complete the visit





HHAExchange+ Mobile App Service Provider User Guide



[HHAExchange+ Service
Provider User Guide](#)


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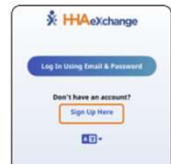
HHAExchange+ Mobile: A Step-By-Step Guide for Caregivers


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!


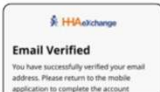
Getting Started: Download, Sign Up, and Register

- 

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.

Knowledge Check 3

What actions can a Services Portal Employer take when reviewing a shift in the Services Portal?

A. Only approve shifts without making changes

B. Suggest a proposed adjustment, suggest a proposed denial, or approve the adjustment or denial

C. Delete shifts that contain errors

D. Create new employee accounts

FI/FMS Visit Approval



- If the Employer is unable to approve a visit the FI/FMS can take action & perform Visit Verification.
 - How?
 - By approving visits in the Verification tab of the Provider Portal.

Vital Signs

Seizure Log

<p>Caregiver Jimmy</p> <p>S: 12:00 PM - 01:00 PM V: Billed: N Shah2 Samir</p> <p>S: 07:00 PM - 08:00 PM V: Billed: N Lopez Maria</p>	<p>Caregiver Jimmy</p> <p>S: 08:00 AM - 09:00 AM V: Billed: N Freeman Jane</p> <p>S: 12:00 PM - 01:00 PM V: Billed: N Shah2 Samir</p>	<p>V: 12:00 PM - 02:00 PM Billed: Y (02:00) Shah2 Samir</p>	<p>Caregiver Jimmy</p> <p>S: 08:00 AM - 09:00 AM V: Billed: N Freeman Jane</p> <p>S: 12:00 PM - 01:00 PM V: 12:00 PM - 01:00 PM Billed: N (01:00) Shah2 Samir</p>	<p>Caregiver Jimmy</p> <p>S: 08:00 AM - 09:00 AM V: 08:00 AM - 09:00 AM Billed: N (01:00) Temp Temp</p> <p>S: 12:00 PM - 01:00 PM V: 12:00 PM - 01:00 PM Billed: N (01:00) Shah2 Samir</p> <p>S: 08:00 PM - 09:00 PM V: 08:00 PM - 09:00 PM Billed: N (01:00) Lopez Maria</p>		
12	13	14	15	16	17	18
<p>DV</p> <p>S: 2h 0m V: Billed: N Caregiver Jimmy</p> <p>S: 08:00 AM - 09:00 AM V: 08:00 AM - 09:00 AM Billed: N (01:00) Freeman Jane</p> <p>S: 12:00 PM - 01:00 PM V: 12:00 PM - 01:00 PM Billed: N (01:00) Shah2 Samir</p> <p>S: 07:00 PM - 08:00 PM V: 07:00 PM - 08:00 PM Billed: N (01:00) Lopez Maria</p>	<p>S: 10:15 AM - 01:45 PM V: 10:21 AM - 01:45 PM Billed: N (03:30) Johnson Barbara</p>	<p>DV</p> <p>S: 2h 0m V: Billed: N Caregiver Jimmy</p> <p>DV</p> <p>S: 2h 0m V: Billed: N Caregiver Jimmy</p> <p>S: 08:00 AM - 09:00 AM V: Billed: N Freeman Jane</p> <p>S: 12:00 PM - 01:00 PM V: Billed: N Shah2 Samir</p> <p>S: 08:00 PM - 09:00 PM V: Billed: N Lopez Maria</p>	<p>DV</p> <p>S: 2h 0m V: Billed: N Caregiver Jimmy</p> <p>S: 08:00 AM - 09:00 AM V: Billed: N Freeman Jane</p> <p>S: 12:00 PM - 01:00 PM V: Billed: N Shah2 Samir</p>	<p>S: 05:45 PM - 06:15 PM V: 05:48 PM - 06:09 PM Billed: N (00:15) Johnson Barbara</p>		
19	20	21	22	23	24	25
	<p>DV</p> <p>S: 2h 0m</p>	<p>DV</p> <p>S: 2h 0m</p>	<p>DV</p> <p>S: 2h 0m</p>	<p>DV</p> <p>S: 2h 0m</p>		



Key Takeaways

Key Takeaways

- FI/FMS should utilize the Services Portal Management tab (in the Provider Portal) to create Services Portal accounts for Employers, Designated Representatives, & Employees
- Log in to the HHAeXchange Services Portal and confirm access
- Verify that Employee shifts are accurate and actionable
- Understand & train the use of approved EVV methods (mobile app [preferred], IVR [alternative])
- Complete visit verification when the Employer is unable to take action
- The **Michigan State Information Center [MI FI/FMS]** is your central source for documents, timelines, and updates.



Support Resources

Support Resources

Training Videos:

- [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](#)

Knowledge Base:

- [Services Portal User Management Permissions](#)
- [Mobile Videos](#)
- [Getting Started Videos](#)
- [Link Mobile ID with caregiver profile](#)

Additional Resource:

- [MI FI/FMS FAQs](#)

State Info Hub

Provider Information Center

- To ensure you stay up to date on all the information, please visit our Michigan Information Center. This State Info Hub will be your primary source of information throughout this implementation such as process guides, training videos and interactive walkthroughs, including:
 - Services Portal Walkthrough
 - Training for Employees using EVV



<https://www.hhaexchange.com/info-hub/michigan-information-center>



The screenshot shows the HHAeXchange website's Michigan Information Center. The header includes the HHAeXchange logo, navigation links for Homecare Software, Technology, Resources, and Company, and a 'Request Your Demo' button. The main content area features a blue banner with the Michigan Information Center title and a 'Provider Onboarding Form' button. A table of contents sidebar is visible on the left, listing sections such as Overview, EVV Compliance, Michigan Home Health Fee for Service (FFS), Michigan Home Help, MI Choice, MI Health Link, Medicaid Managed Care Plan (MHP) and Behavioral Health, MI FI / FMS, Electronic Data Interchange (EDI) Process, Frequently Asked Questions, and Contact. The main content area displays the 'Michigan FMS / FI Electronic Visit Verification' section, which includes a description of the program, a list of key requirements (Compliance with federal EVV requirements, Confirmation that services are delivered as authorized, Accountability for caregiver services, Accurate payment for services provided), and a 'Welcome Letter' section with a link to the letter. An 'Informational Session' section mentions a session on Feb 4th that has concluded, with links to review the slide deck and recording.

➤ 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 (EDI)
Knowledge Base**

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

➤ Additional Resources

HHAeXchange
Client Support
Portal:

[https://hhaexchange.
my.site.com/s/login/](https://hhaexchange.my.site.com/s/login/)

MI EVV Info:

[www.Michigan.gov/
EVV](http://www.Michigan.gov/EVV)

MI Dept. of
Health & Human
Services
(MDHHS) Email:

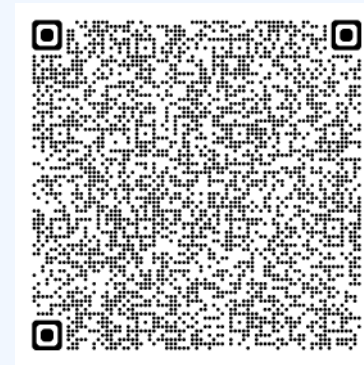
[MDHHS-
EVV@Michigan.gov](mailto:MDHHS-
EVV@Michigan.gov)

MI Contact
Methods:

- Atypical providers call:
1-800-979-4662
- Typical providers call:
1-800-292-2550
- Beneficiary Help Line:
1-800-642-3195



MI FI/FMS: EVV Adoption Training



Webinar Registration - Zoom

[Register Here](#)

Thursday, March 26 @ 2:00 PM ET

Questions

thank you