



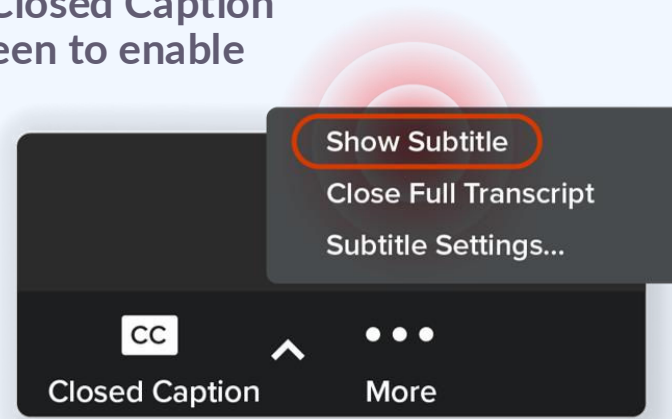
**Our Webinar Will
Begin Shortly**



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New York Easy EVV: Scheduling & Visit Capture

September 2026

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speakers



Janny Sachani

Senior Training Specialist

Areas of Expertise

Provider education • Sponsored workflows • Revenue cycle readiness

Helping providers build confidence with HHAeXchange workflows and resources.

agenda



- EVV Overview
- Scheduling
- Mobile App Setup
- Capturing EVV
- Prepare for Your Next steps
- Resources & Support

Overview



This session introduces the **scheduling and visit capture workflows in HHAeXchange**. Providers will learn how to set up schedules, support caregiver EVV capture, maintain compliance, and prepare visits for billing.

Who should attend?

Agency Administrators, Office Managers, Scheduling Coordinators, who manage Caregivers.



➤ Objectives of Today's Webinar

You will be able to:

Create and manage schedules that align with the authorized service and caregiver.

Understand scheduling options in HHAeXchange, including Single Schedule and Master Week.

Capture EVV accurately using available visit capture methods.

Identify key readiness practices that support EVV compliance and billing.





Corresponding Terminology

Different names. Same meaning. One connected System.

HHAeXchange Standard System Terminology	Corresponding Terminology		
 CONTRACT / PAYER	• FFS • HHS	• MCO • State	• Plan
 PATIENT / MEMBER	• CDS Employer • Consumer	• Recipient • Client	• Participant • Beneficiary
 CAREGIVER	• Aide • Homecare Aid • Homecare Worker	• Worker • Direct Care Worker • Service Provider	• Attendant • CDS Employee
 AGENCY / PROVIDER	• FMSA • Vendor	• Program Provider	
 COORDINATOR	• Care Coordinator • Case Coordinator	• Service Coordinator • Care Types	
 UNITY NUMBER	• EMPI • Master Patient Number	• Shared Patient Number	
 SECONDARY IDENTIFIER	• MPI • Promise Code		



Why it matters

Terminology may vary by payer, state, or program but the person and purpose remain the same.



EVV Overview

› What is Electronic Visit Verification?



EVV confirms service delivery through electronic clock-in and clock-out capture.



EVV helps ensure accurate documentation, support compliance, and improve care quality.



> Six Elements of a Cures Compliant Visit



Who

Patient



Who

Caregiver



What

Type of
Service



Where

Location
of
Service



When

Date of
Service



When

Time of
Service

EVV Compliance: From Risk to Control

What creates EVV risk — and what reduces it

What creates EVV risk:

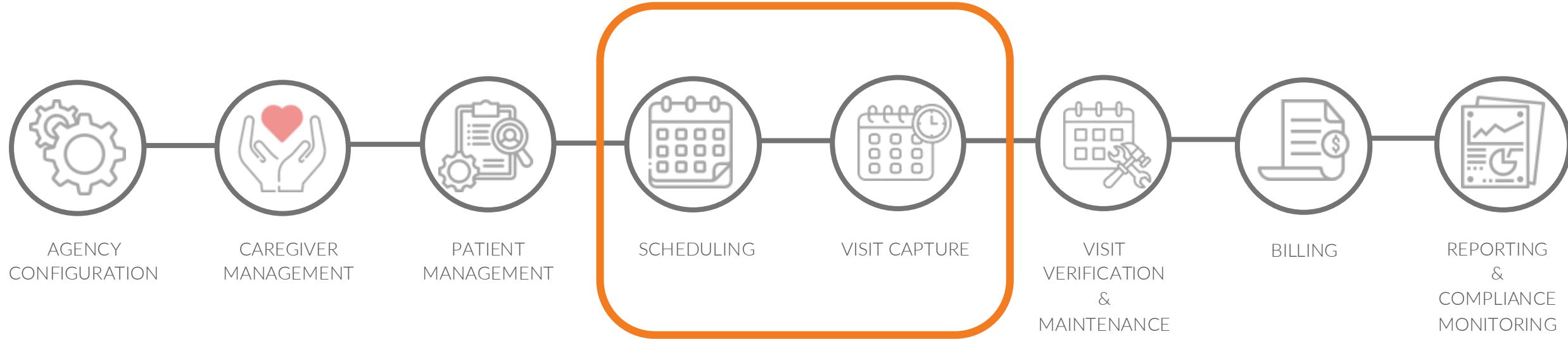
- Gaps in setup, scheduling, or caregiver readiness
- Misalignment between visits, services, and authorizations
- Inconsistent EVV capture across similar visits
- Manual confirmations may require additional review
- Data inconsistencies can delay prebiling and claims processing

What reduces EVV risk:

- Intentional setup before visits begin
- Consistent scheduling and service alignment
- Clear standards for how EVV is captured and reviewed
- Complete, accurate, electronically captured EVV data
- Ongoing monitoring and audit/readiness review

Prevent issues early: setup → capture → review → readiness

> EVV Tracker





Scheduling

Scheduling: Set Up the Visit Before Care Begins

Create a clear plan for who, what, when, and where the service will occur.

What is Scheduling?

Scheduling creates the visit on the patient calendar before care occurs and connects the visit to the appropriate caregiver, service, and authorization.

Scheduled Visit

- Visit is created before care occurs.
- Caregiver sees the visit on their schedule.
- EVV is expected to align with the scheduled visit.

Unscheduled Visit

- No scheduled visit exists when the caregiver clocks in.
- EVV is captured without a scheduled visit.
- Follow-up and review may be needed.



Unscheduled Visits occur more frequently due to flexible, real-time care delivery. This makes consistent monitoring, review, and follow-up practices especially important.



Scheduling: Two Ways to Build a Scheduled Visit

Choose the approach that best fits the patient's schedule

Single Schedule

- 1 Open the patient's Calendar
- 2 Select the date and create a new visit
- 3 Enter the visit details
Time • Caregiver • Pay Code • Primary Bill To • Service Code
- 4 Save to create the visit



Master Week

- 1 Open the patient's Master Week
- 2 Select Add Master Week and choose the From Date
- 3 Enter the recurring visit details
Time • Caregiver • Pay Code • Primary Bill To • Service Code by day
- 4 Save, then update the Calendar
Deploy the recurring schedule to the calendar.



Provider tip: Confirm the caregiver has the correct discipline before scheduling the visit.

Quick Poll

Let's see what applies to your agency

**How many of you have
overnight shifts?**

01

**Yes — frequently
or occasionally**

02

**No overnight
shifts**



Respond in the Zoom poll.

Automatic Splitting of Overnight Shifts



Make qualifying overnight shifts easier to manage and review.

What it does

Automatically splits qualifying overnight shifts into two visit transactions across both days—without requiring multiple clock-ins/outs or a separate schedule.

How it works

01

Enable

Turn on Automatic Splitting in Office Setup.

02

Configure

Set duration, end-time, and service rules.

03

Capture

Qualifying overnight visits split automatically for review.

Provider tip: Review the office settings before scheduling overnight care.

Admin > Office Setup > General

Enable Automatic Splitting of Overnight Shifts

The screenshot shows the 'Edit Office' form with the 'Automatic Splitting of Overnight Shifts' section highlighted by a red box. The section includes the following fields:

- ☒ Automatic Splitting of Overnight Shifts
- Minimum Duration for Overnight Shifts: Greater Than 15
- Service Types for Overnight Shifts: Select one or more...
- Splitting of Shift by: Confirmation
- First Visit Confirmed End Time: 11:59 PM (selected) / 12:00 AM

[Automatic Splitting of Overnight Shifts](#)

➤ Shift Overlap Allowance

How minor overlaps are handled — and how providers should configure them

What the allowance does

Minor caregiver shift overlaps can be automatically resolved.

- Reduces manual corrections and prebilling rework
- Supports EVV compliance and smoother caregiver transitions

Provider takeaway

Think of shift overlap as a prevention tool:

get scheduling, caregiver assignments, and service setup right first — then let the configured overlap allowance handle eligible minor overlaps.

Configuration depends on the payer relationship

Linked Payers

Payer controls the overlap allowance.

- Eligible service codes
- Allowed overlap minutes (7 min)
- Effective date

Use the HHAeXchange Shift Overlap Tolerance Reference Guide for payer-specific details.
[HHAeXchange: Shift Overlap Tolerance Reference Guide](#)

Internal Payers

Provider can configure the allowance.

Admin → Reference Table Management → Service Code

Enable “Allow Member Shift Overlap” and set the allowed overlap minutes.
Example: 7 minutes.

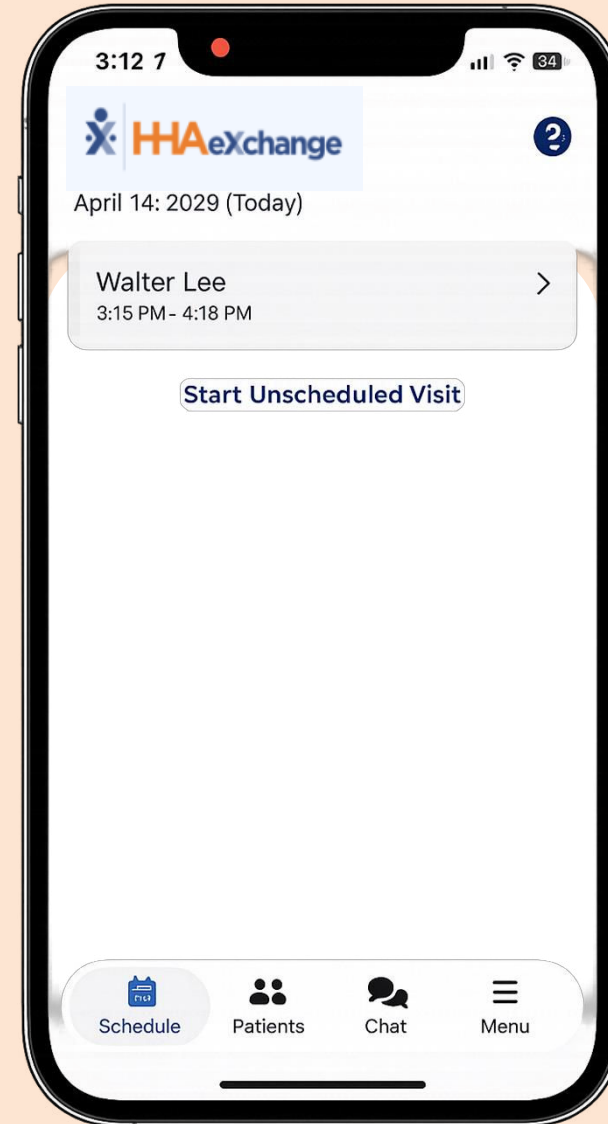
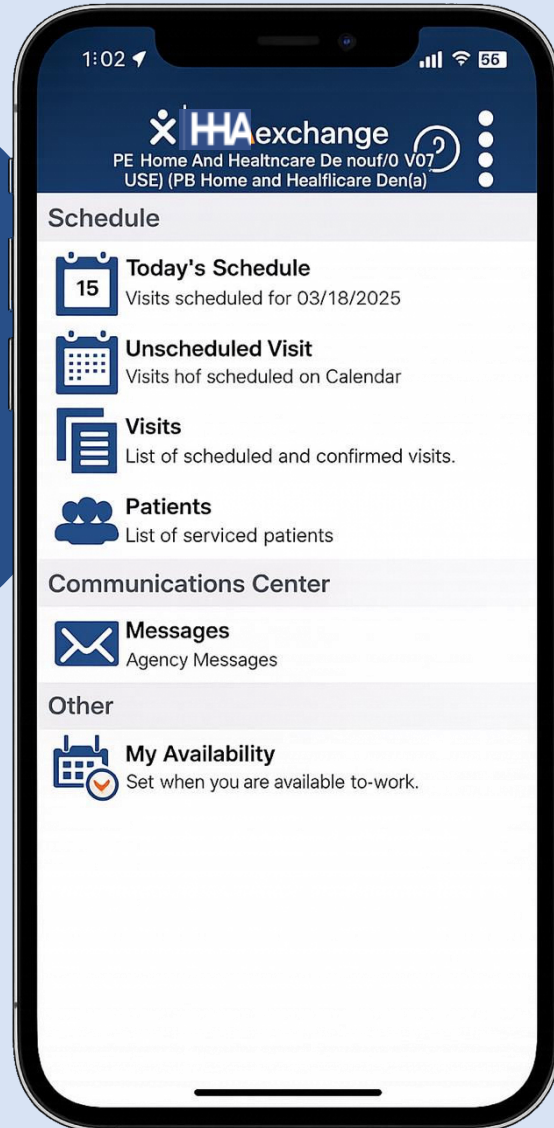
Key point: Small eligible overlaps can be handled automatically — but the configuration must match the payer setup.



Mobile App Setup

New HHAeXchange+ Experience

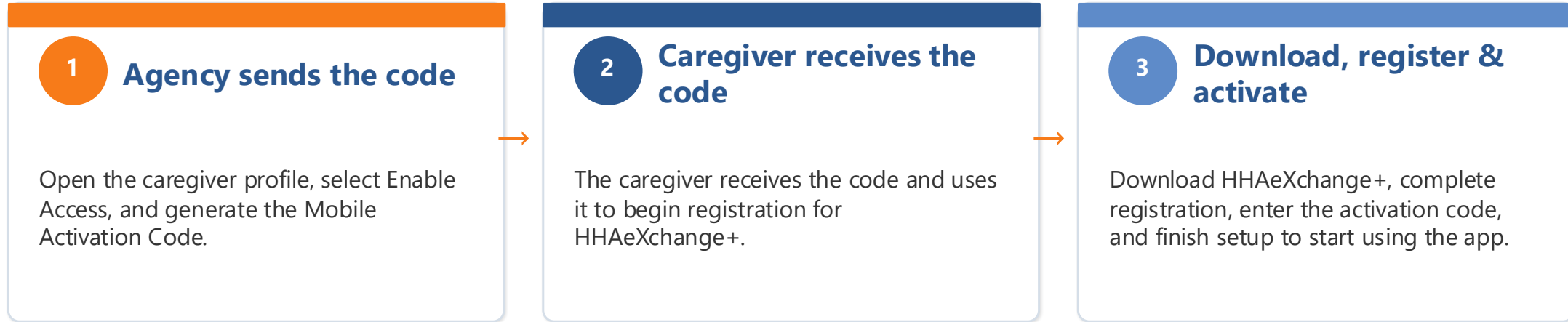
Out
with the
OLD!



In with
the
NEW!

Mobile App Setup: Registration & Activation

A simple path from activation code to a caregiver ready to use HHAeXchange+

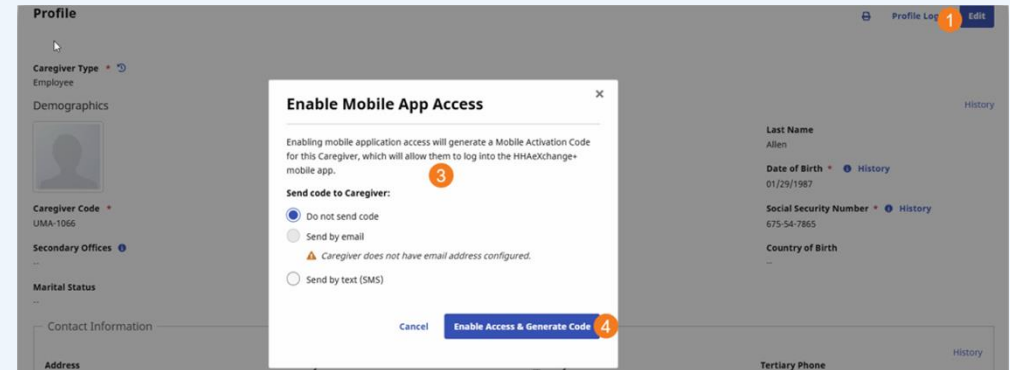


Provider check

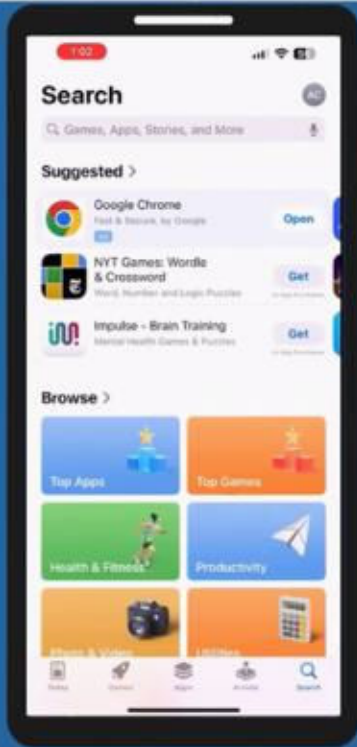
Before the first EVV visit, confirm the caregiver:

- ✓ has the HHAeXchange+ app installed
- ✓ has completed registration and entered the activation code
- ✓ is fully activated and ready to capture EVV

Keep the activation code and caregiver credentials aligned with the caregiver profile in HHAeXchange.



> Registration & Setup Path



NEW CAREGIVER

New-Caregiver Setup Path

New Caregiver Registration at a Glance



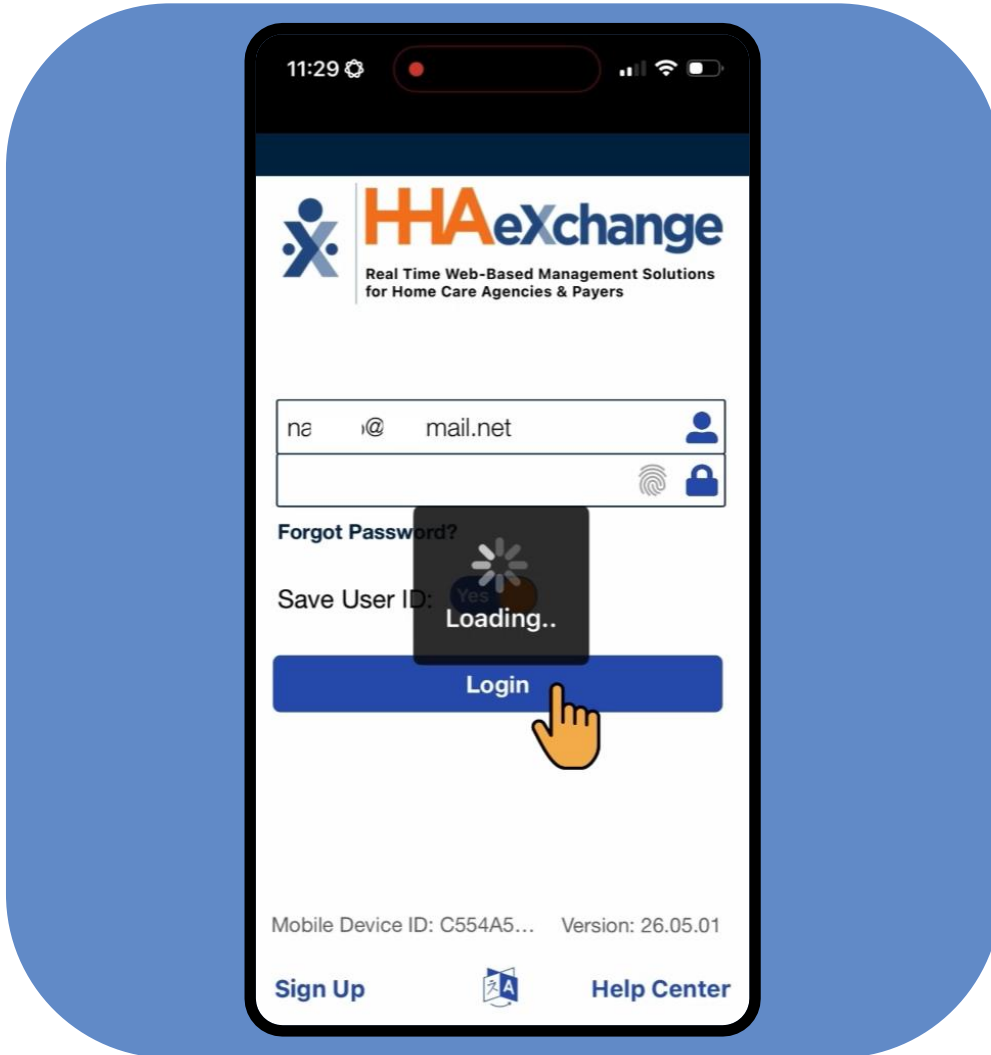
1. Agency generates / provides activation code.
2. Caregiver downloads HHAXchange+ and registers.

New caregivers: use the activation-code path and complete registration before the first EVV visit.

> Transition / Migration Path

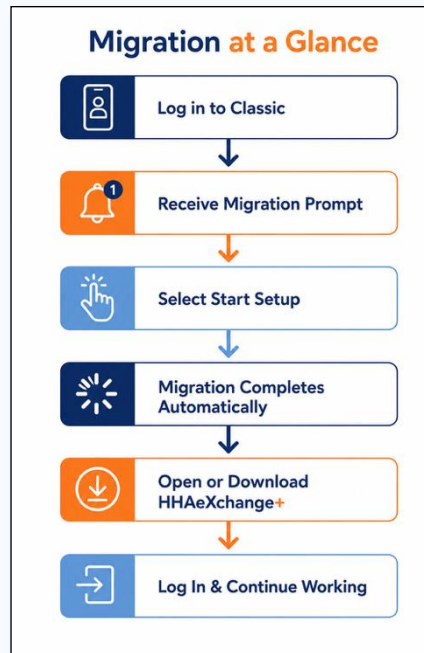
No Activation code required

This applies to an existing caregiver who is already using the Classic app, they follow the migration or transition path.



EXISTING CAREGIVER

Transition / Migration Path



1. Current caregiver uses the Classic app.
2. Caregiver follows the migration prompt / transition guidance.
3. Caregiver continues in HHAeXchange+ after migration.

Existing caregivers: use the migration path — no new activation code.

HHAeXchange+ Mobile App Resource

A practical guide to help caregivers get onboarded and ready for EVV

1

Explore the guide

Review the 5 key mobile-app benefits, including faster EVV, caregiver communication, schedules, compliance tasks, and care-plan documentation.

2

Choose the right path

Supporting existing caregivers? Use the transition resources. Onboarding new caregivers? Use the new-caregiver setup guidance.

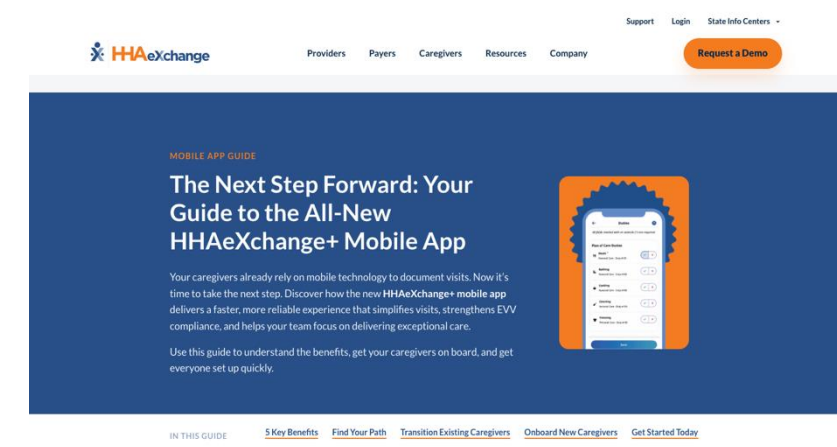
3

Get started & share resources

Use the training videos, Caregiver User Guide, Help Portal, and Mobile App Topics. Share these resources with caregivers and new users.

Mobile App Guide

The Next Step Forward: Your Guide to the All-New HHAeXchange+ Mobile App



Open the full guide

Scan the QR code or use the link for onboarding, transition, and caregiver training resources.

[HHAeXchange+ Mobile App Guide](#)



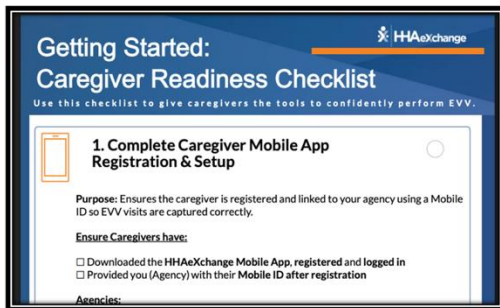
Caregiver Readiness

Resources to help caregivers prepare for EVV and their first visit

Before the first EVV visit, make sure caregivers know how to register, use the mobile app, and follow the EVV workflow. **Use the resources below as your readiness checklist.**

Caregiver Readiness Checklist

Use this checklist to confirm the caregiver is prepared for EVV and mobile app use before the first visit.



[Caregiver Readiness Checklist](#)

HHAeXchange+ Caregiver User Guide

A step-by-step reference for downloading, registering, and getting started with the mobile app.



[HHAeXchange+ Caregiver User Guide](#)



Capturing EVV



EVV Capture Methods

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

FOB

Alternative EVV Method



- ✓ Any phone can be used
- ✓ Call Toll-Free Number
- ✓ Passcode based

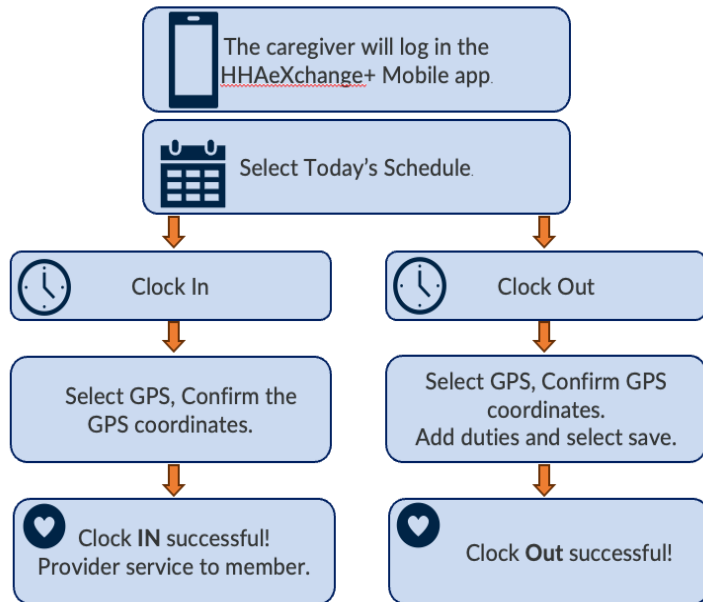
Provider tip: Choose the approved capture method that fits your workflow and make sure caregivers are ready before the first visit.

Visit Capture Process by Method

Mobile App

Preferred EVV method

Mobile App Overview



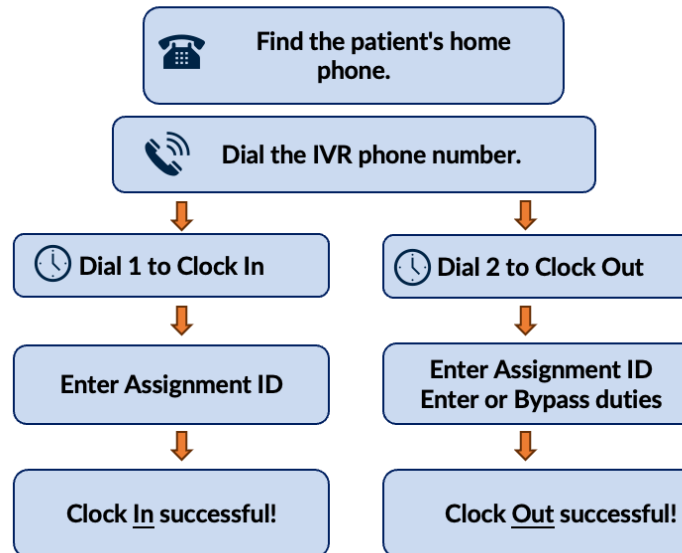
Best when caregivers are using the HHAX+ Mobile App at the patient location.

IVR

Alternative method

IVR Capture Overview

Interactive Voice Response Number English & Spanish



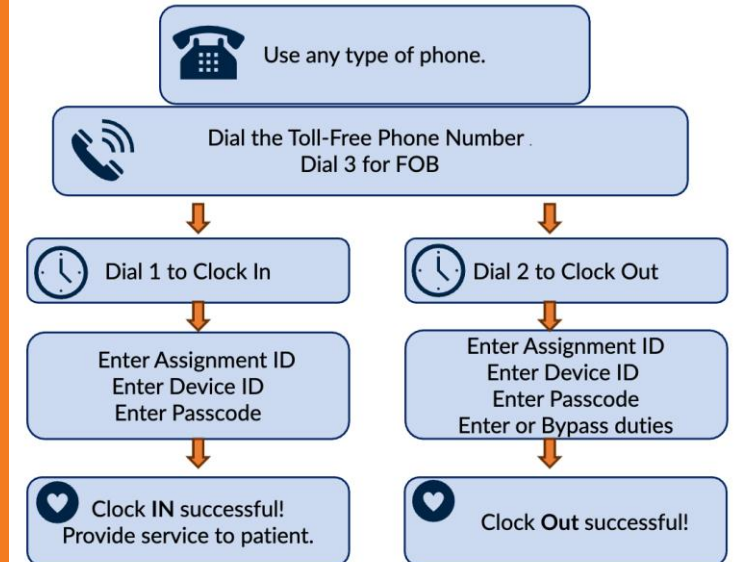
Use only when IVR is the approved method and the patient landline is available.

FOB

Alternative method

FOB Capture Overview

Alternate Device



Use when FOB is configured and the caregiver has the correct Device ID and passcodes.

➤ Visit Capture: Scheduled Visit

Scenario:



A caregiver has a **scheduled visit** for today.

Using the **HHAeXchange+ Mobile App**, they will:



Select the scheduled visit



Clock In using **EVV**



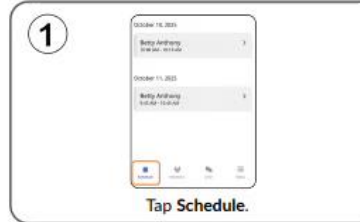
Complete any required duties/tasks (if applicable)



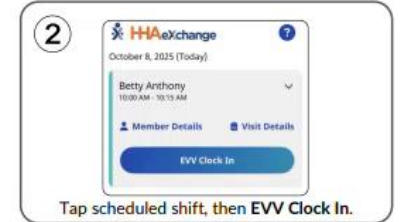
Clock Out when the visit is finished



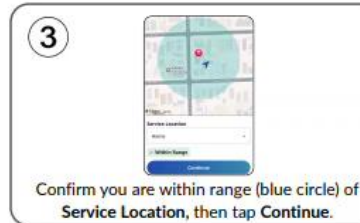
Clock In/Out of Scheduled Visits



Tap **Schedule**.



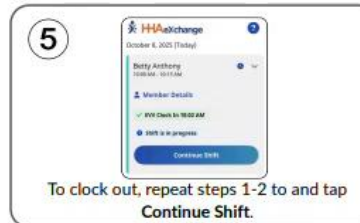
Tap scheduled shift, then **EVV Clock In**.



Confirm you are within range (blue circle) of **Service Location**, then tap **Continue**.



Receive prompt that **EVV Clock In** is successful.



To clock out, repeat steps 1-2 to and tap **Continue Shift**.



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**

Visit Capture: Unscheduled Visit

Scenario:



A caregiver arrives at the patient's home to perform an **unscheduled visit**.

Using the **HHAeXchange+ Mobile App**, they will:



Create an **unscheduled visit**



Select the **patient**



Choose the appropriate **service**



Clock In using **EVV**



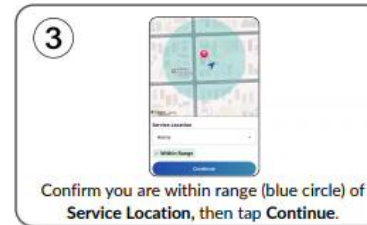
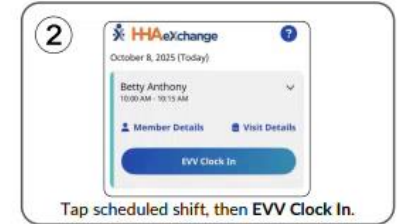
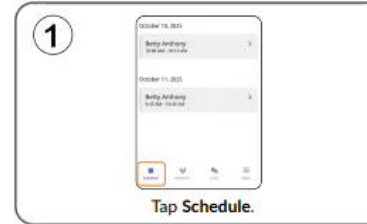
Provide care and complete any required **duties/tasks** (if applicable)



Clock Out when the **visit is finished**



Clock In/Out of Scheduled Visits







Offline Mode: Stay Ready Without Connectivity

Capture EVV when internet or cell service is unavailable — then sync when you are back online.



What Offline Mode does: allows caregivers to complete EVV clock-ins and clock-outs without connectivity.

1 Prepare while online

Log in with internet access so schedules and patient information are available on the device.

2 Capture while offline

When signal is unavailable, the app can continue capturing EVV for scheduled and unscheduled visits.

3 Reconnect & sync

Once connectivity is restored, the app uploads the offline activity so EVV data can sync.

Provider readiness check

Make sure the caregiver logs in while online and has Offline Mode access ready before the first visit.

[HHAeXchange+ Caregiver User Guide](#)



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

1



Log in to the mobile app while you still have internet so it can load your visit and patient information.

2



Once you're in an area with poor signal, turn off your cellular data to enable offline mode.

3



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

1



Complete your visit tasks as usual (clock in/out, and/or enter duties).

2



The mobile app will upload everything once you're back online.



GET BACK ONLINE TO SYNC YOUR WORK

1



Turn on your cellular network.

2



Open the mobile app and log in.

3



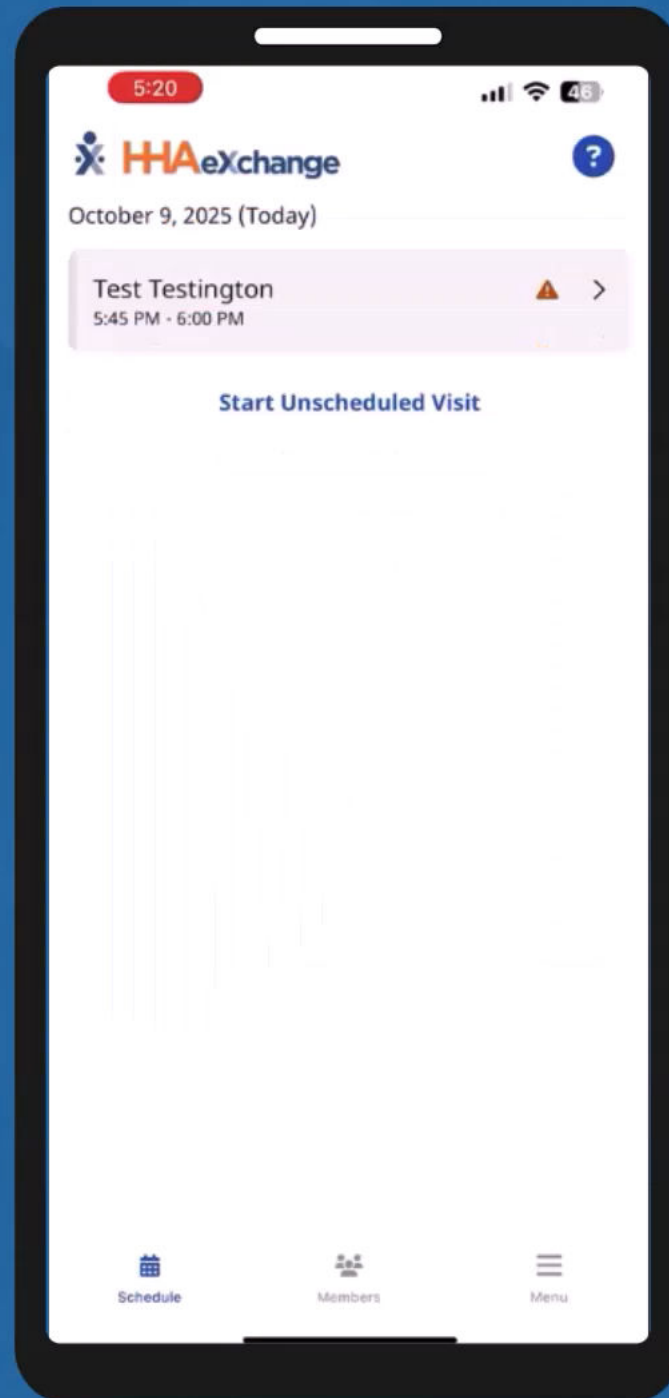
Offline activity will upload automatically once you're back online.



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



Offline Mode in HHAeXchange+



Visit Capture Best Practices

Compliant use requires the correct method, correct credentials, and accurate visit capture

COMPLIANT USE

- Approved capture method
- Clock at patient location
- Use correct IDs & PINs
- Match schedule & patient
- Complete full visit capture
- Use Offline Mode if needed

VERIFY BEFORE YOU CAPTURE

- Correct caregiver
- Correct patient
- Correct service / discipline
- Correct device or phone
- Scheduled visit details align
- Connection / Offline Mode ready

COMMON RISK AREAS

- Away from patient location
- Wrong capture method
- Incorrect credentials / device info
- GPS or visit-detail mismatch
- Missing clock-out or manual edits
- Incomplete visit capture



Prepare for Your Next
Steps

Next Steps & Upcoming Webinars

Stay connected, keep learning, and attend a session that works for you.



Upcoming Featured Webinars



NY Easy EVV: Visit Maintenance Webinar



September 24
11:00 AM ET

- Learn how to correct and maintain visits for EVV compliance and billing.

[NY Easy EVV: Visit Maintenance Webinar](#)

Scan to Register



Billing in HHAeXchange Webinar



October 1
11:00 AM ET

- Learn how accurate EVV turns into accurate claims being billed out of HHAeXchange.

[What's New in NY? Billing in HHAeXchange Webinar](#)

Scan to Register



Ongoing Events & Training

Explore live webinars, office hours, and training sessions.



Daily Office Hours

Offered daily @ 11:00 AM ET

- Get live help and answers to your questions

[Register Here](#)



Teach Me Tuesday Series

Every Tuesday @ 2:00 PM ET

- Live training on key topics

[Register Here](#)



More Training Events

Upcoming sessions & webinars

- Visit our training events page

[View Here](#)



Stay Connected

Watch for email communications and follow HHAeXchange for the latest updates, tools, and training opportunities.





Resources & Support

HHAeXchange+ Mobile App Resources

Choose the resource that matches your role

1 Existing Caregivers

BEST FOR

Caregivers already using the Classic app

HHAeXchange+ Customer Guide

Use it to:

- Migration overview & timeline
- Caregiver communication resources



SCAN TO
VIEW

[HHAeXchange+ Customer Guide \(Migration Guide\)](#)

2 New Caregivers

BEST FOR

Caregivers joining after migration

HHAeXchange+ Caregiver User Guide

Use it to:

- Download & registration steps
- Offline PIN & first login



SCAN TO
VIEW

[HHAeXchange+ Caregiver User Guide](#)

3 Agency Staff

BEST FOR

Staff supporting caregiver mobile access

Mobile User Management

Use it to:

- Generate activation codes
- Manage access & passwords



SCAN TO
VIEW

[Mobile User Management Article](#)

Provider tip: Share the resource that matches the caregiver or staff member's path.

Caregiver Worker ID

HHA/PCA Registry Number

Identify caregivers who may be missing a registry number — then update the caregiver profile.



Scan to open

1 FIND

Go to Reports > Caregiver > List of Caregivers (Ent).

Select the State Registry checkbox under Select Caregiver Employment Columns.

Select Print Excel to export the report.

2 REVIEW

Review the exported report to identify caregivers who may be missing an HHA/PCA Registry Number.

Use the report to determine which caregiver profiles may need to be updated.

3 UPDATE

Open the caregiver's profile.

Enter or update the value in the HHA/PCA Registry Number field.

HHA/PCA Registry Number

QUICK RESOURCE

HHAeXchange FAQ: [How do I add a Home Care Worker ID \(HHA/PCA Registry Number\)](#)

Use this article for the step-by-step process.

➤ Additional Resources

Keep these resources handy as you continue your HHAeXchange onboarding and caregiver readiness journey.

HHAeXchange University



- Self-paced online courses
- Agency training curriculum
- Mobile App training
- Scheduling, EVV, Billing & more

Use anytime you need a refresher or additional guidance.

university.hhaexchange.com

Provider Knowledge Base



- Search articles anytime
- Mobile App documentation
- Troubleshooting guides
- Step-by-step instructions

Use anytime you need a refresher or additional guidance.

knowledge.hhaexchange.com

Customer Training Events



- Upcoming live webinars
- Office Hours
- Bootcamps
- Product training sessions

Use anytime you need a refresher or additional guidance.

hhaexchange.com/training-events

Tip Bookmark these resources and share them with your team so they are easy to revisit during onboarding and day-to-day support.



NY Provider Info Center

Your go-to resource for payer-specific EVV and implementation guidance



Use the Provider Info Center to find:

- 1 Payer Requirements & Updates**
EVV requirements, implementation updates, and important deadlines.
- 2 Service Codes & Billing Guidance**
Service code information and resources to support setup and billing.
- 3 Training & Webinars**
Upcoming and on-demand training for key HHAeXchange workflows.
- 4 EVV / EDI Resources & FAQs**
Job aids, FAQs, EDI guidance, and implementation resources.

Bookmark the Provider Info Center for the latest updates and resources.

The screenshot shows the HHAeXchange Provider Info Center website. At the top, there's a navigation bar with links for Providers, Payers, Caregivers, Resources, and Company, along with a 'Request a Demo' button. Below the navigation bar, the title 'Provider Info Center' is displayed. A search bar and a 'Filter by State' dropdown menu (set to New York) are present. The main content area features five cards for different payers: Aetna, Teamcare, Elderplan Homefirst, VillageCareMAX, and VNS Health. Each card includes the payer's logo, name, and a 'Go to Info Hub' link.

Use the Provider Info Center to stay current as payer resources and training opportunities are updated.

Need Help?

We're here to help. Use the resources below based on your questions or needs.



Payer-Related Questions

Contact Your Payers Provider Relations Team

For questions related to payer requirements, participation, or payer-specific policies.

Reach out to your ArchCare, MetroPlus, VillagecareMax or Hamaspik Provider Relations team.



HHAeXchange Questions

Contact HHAeXchange Support

For questions related to onboarding, EVV, billing, technical support, or system functionality.

Submit a support request through the [Client Support Portal](#)



For payer-specific questions, contact your payer. For HHAeXchange questions, contact HHAeXchange Support.

thank you