



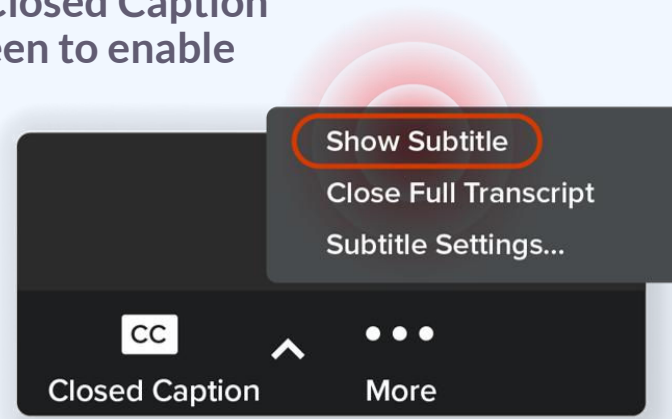
**Our Webinar Will
Begin Shortly**



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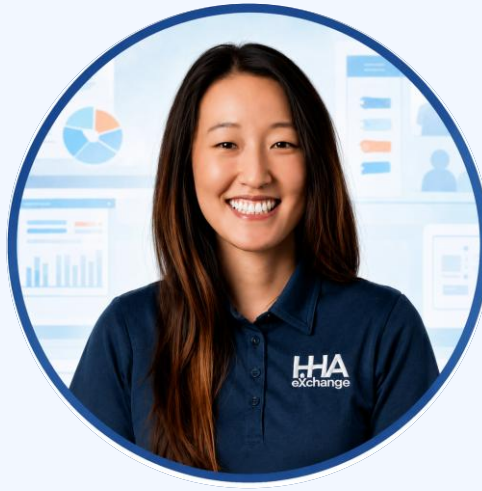
NY Alt EVV: Getting Started

September 2026

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speakers



Ashley Cho

Role: Sr Training Specialist

Tenure: 5 years

Areas of Expertise: Billing and
Revenue Cycle

agenda

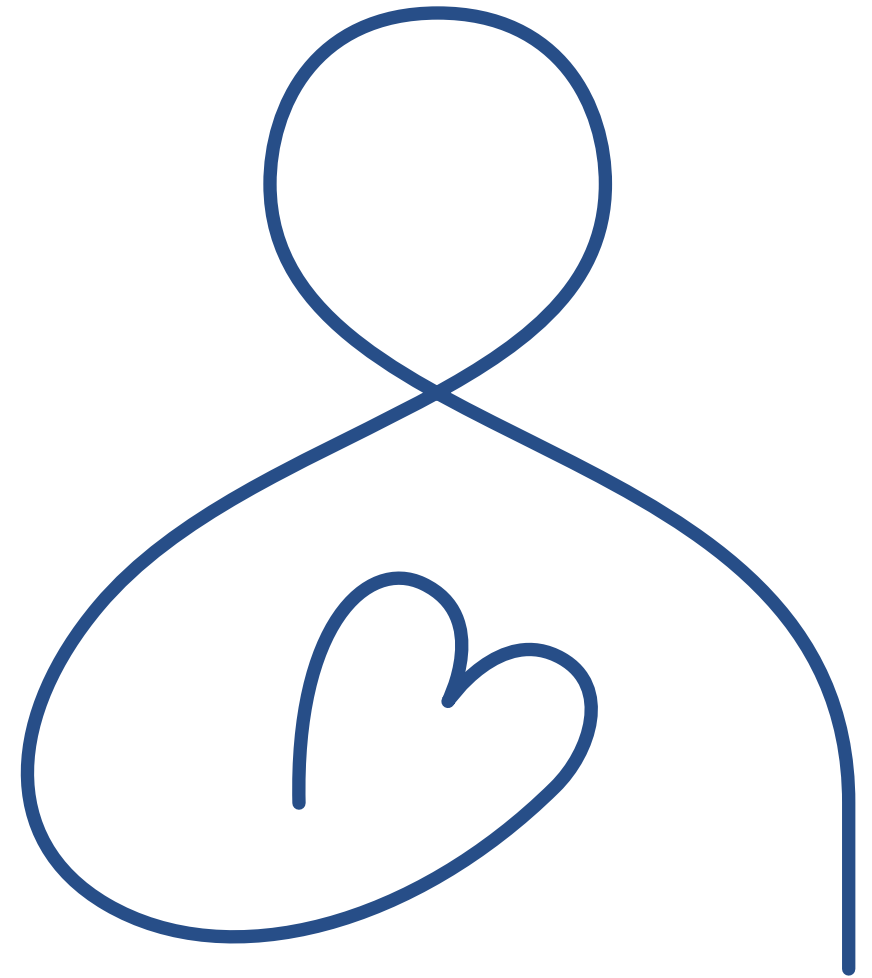
- What is EDI
- EDI Onboarding Workflow
- Testing Requirements
- Best Practices
- What's Next
- Resources & Support
- Questions?

Overview

This training will provide a clear understanding of how to begin the integration process with HHAeXchange. You'll learn how to coordinate with your EVV vendor, submit an integration ticket, and understand how data flows between your third-party system and HHAeXchange.

Who should take this training?

Agency Administrators, Office Managers, Scheduling Coordinators, Billing Managers and other provider stakeholders.



➤ Objectives of Today's Webinar

You will be able to:

Describe the EDI Integration workflow, key milestones, and provider responsibilities.

Identify the onboarding steps required to prepare for a successful integration.

Locate the resources and support available throughout the integration process.





What is EDI?

> What is EDI?

A simple way for two systems to exchange data — accurately, efficiently, and reliably.

EDI = Electronic Data Interchange

IN SIMPLE TERMS

EDI

A standard way for two separate systems to transmit data to each other in an efficient and reliable manner.

SYSTEM A
Send



EDI
STANDARD ✓



SYSTEM B
Receive



Validation matters

Data and file format validation are crucial for clean data to be ingested.

Clean file in → Cleaner processing out.

When EDI is used

When two separate systems need to share data with each other in a dependable way.

Why it works better

A standardized format helps the file move efficiently and reliably between systems.

Provider takeaway

Think of EDI as the bridge that helps systems speak the same language.

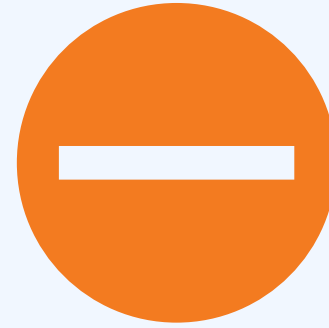


EDI Onboarding Workflow

➤ POLL – Do you have an HHAeXchange portal?



Yes



No

> If No, then sign up for an HHAeXchange portal

The first step to starting your integration is with an HHAeXchange portal.



For Portal Access – Scan
this QR code



WHY IT MATTERS

As an EDI provider, you will need an HHAeXchange portal to integrate with your third party EVV system.

> If Yes, then request for integration with your HHAeXchange portal

The second step is to put in a request to integrate your EVV vendor with HHAeXchange.



Category: Data & Integration

Subcategory: 3rd Party Vendor Integration New

For Integration – Scan this QR code



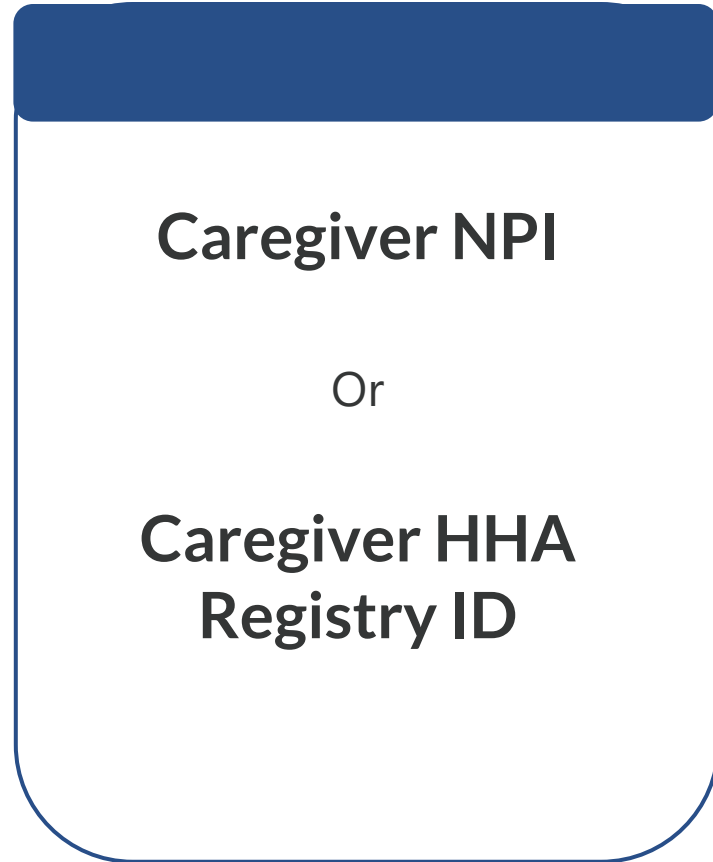
WHY IT MATTERS

As an EDI provider, your third party EVV vendor will need to integrate with HHAeXchange to send over EVV data.



Caregiver Credentials

Accurate caregiver identifiers ensures data is accurate for billing.



The NY Department of Health requires that a Caregiver's NPI or Home Care Registry ID be included in claims for MCO billing.

Before sending Caregiver data, ensure that the file includes their NPI or their HHA Registry IDs.

These identifier allow the state of NY to identify the caregiver in the NY Caregiver Registry.



Having the right credentials allows the state of NY to accurately identify the caregiver and allow for accurate billing.

Payer Placement Workflow

How authorization and visit data move into HHAeXchange

THREE SIMPLE HANDOFFS

1 PAYER



Placement sent

Payer sends the member's placement (authorization) to HHAeXchange.

Member ID

Service /
units

Care dates



2 HHAeXCHANGE



Placement accepted

HHAeXchange stores the member and authorization details for the placement.



PLACEMENT READY
FOR VISITS



3 AGENCY / EVV VENDOR



Visit data submitted

The agency sends visit data with Member and caregiver information to HHAeXchange.

Member

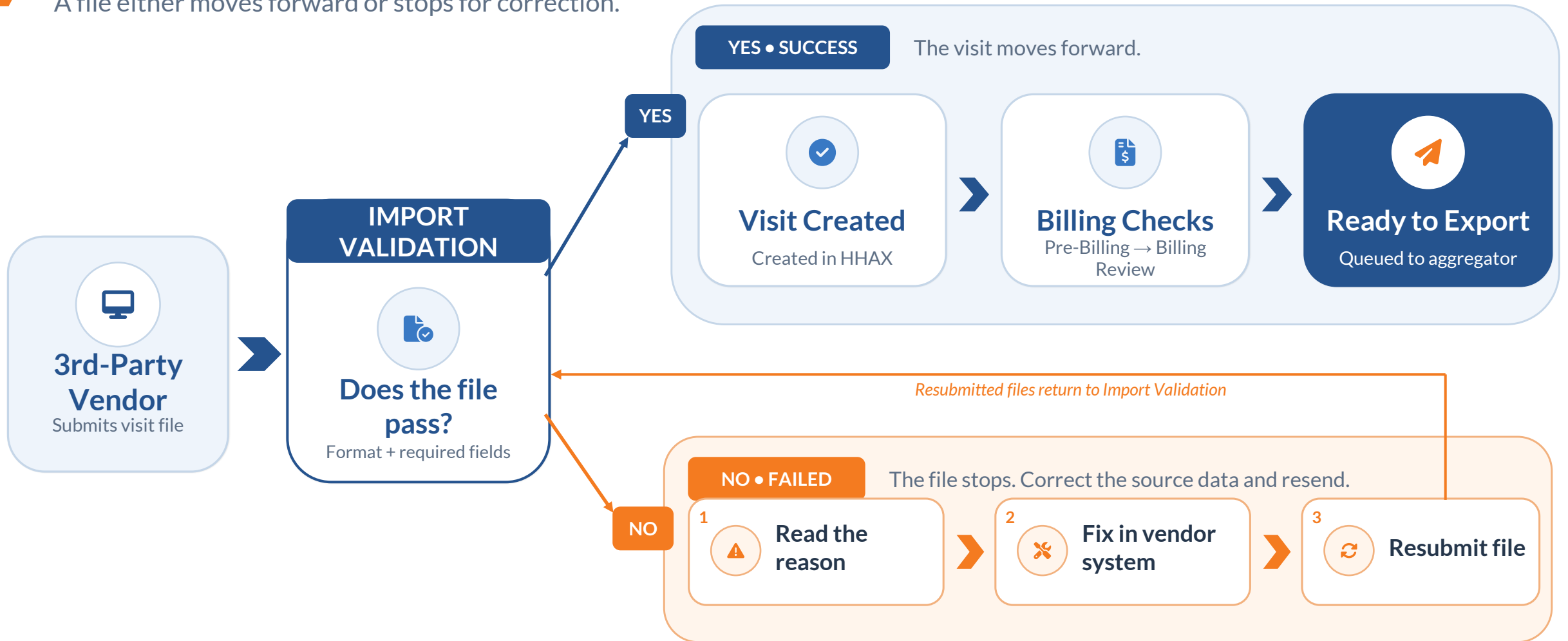
Caregiver

Visit

 **WHY IT MATTERS** The placement establishes the member and authorization details HHAeXchange uses when visit data arrives.

EDI Provider Visit Lifecycle

A file either moves forward or stops for correction.



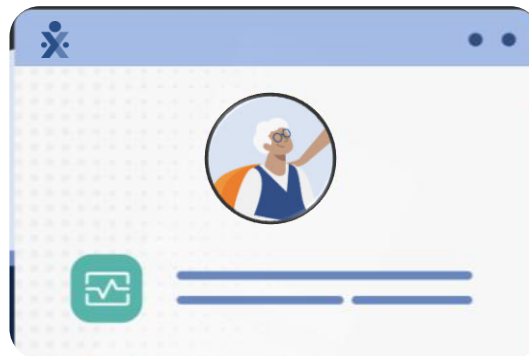
SIMPLE RULE: PASS = move forward. FAIL = fix in the vendor and resubmit.

> Data Exchange Responsibilities



Everyone has a part in the integration process.

- Providers work with their 3rd Party Alt EVV Vendor to upload the Caregiver and Visit File into your HHAeXchange portal
- Visit data files should be continually sent and maintained by the provider even after initial data setup
- The Payer will send Patient demographic and authorization files into your HHAeXchange portal
 - *If you do not see your patients' or authorization information, please reach out to your payer to send that information to HHAeXchange*





Testing Requirements



Testing for New Vendors/Proprietary Systems



Testing is only required for new vendors and proprietary systems that have never integrated with HHAeXchange before.

1 V5 FILE TESTING



New vendors/proprietary system users will use the [HHAeXchange File Format Validation Portal](#) to confirm that their file is compatible.

2 INTEGRATION REQUEST



Once the file has passed validation, a ticket needs to be opened with the [Provider EDI Integrations](#) team to begin EDI integration with HHAeXchange.



READY FOR INTEGRATION

Our Solutions Delivery Team will reach out to walk you through the integration process!

CHECK OUT OUR HELPFUL VIDEO: [How to Navigate the Customer Support Portal](#)



How to Use the File Format Validation Portal



1. Access the portal [HHAeXchange File Format Validation Portal](#)
2. Complete the Home Page form
 - Choose **State** and **Interface Spec**
 - Enter **Tax ID** and **Contact Email**
 - EVV Vendor's **Name** and **Email**
3. Click **Next** to proceed to the file upload screen.
4. Upload your file by selecting and opening it, then click **Next**.
5. On the **Results** page:
 - Green checkmarks = passed validations.
 - Red X = validation failure
6. If all checks pass, click **Finish** to return to Home, and await the email confirming SFTP activation.

The screenshot displays the 'File Format Validation Portal' home page. At the top, it says 'HHAeXchange File Format Validation Portal Home'. Below this is a disclaimer: 'This tool is used to validate and ensure structural correctness as well as basic data formatting prior to importing your EDI file into the Production environment. Your SFTP account is activated only after successful validation is completed. Note: Upon validation data is discarded (not stored in any HHAeX server)'. A progress bar shows three steps: 'Identify Agency' (selected), 'Upload File', and 'Result'. The 'Result' section is titled 'File Processed Result' and lists ten validation checks, each with a green checkmark: File Format Validation, File Naming Convention Validation, Text Qualifier Validation, Column Count and Position Validation, Mandatory Fields Validation, Max Field Length Validation, Numeric Field Validation, Date Format Validation, Data Format Validation, and Situational Fields Validation. A yellow banner at the bottom states: 'Congratulations! Your file format has been successfully validated. HHAeXchange will email your Agency Contact within 48 hours with the next steps in the EDI Process. If you do not receive a response, please email prosupport@hhaexchange.com for further details.' A red circle highlights the 'Finish' button in the bottom right corner.



Best Practices

Data Transmission – Best Practices



- Send visit data in near real time.
- Ensure visits have been verified and checked for accuracy in the third-party EVV system before sending to HHAeXchange to avoid rejections and errors downstream.
- Data that is unchanged should not be re-sent to HHAeXchange.
- Consistently checking and correcting rejections allows you to re-send data without delay.

CHECK OUT THE HHAEXCHANGE KNOWLEDGE BASE: [Best Practices for Integration and EVV Compliance](#)



What's Next

➤ EDI Post Integration Webinar – October 6 @ 11AM ET

What to Expect

- Verifying linked contracts and reviewing patient and authorization data
- Managing caregiver and visit imports and coordinating with your vendor to resolve visit rejections
- Navigating the billing stages in HHAeXchange

Register for Training Here!



[EDI Post Integration Workflows
Webinar](#)



Knowledge Base



- ✓ Review important resources found under **Documentation > V5**.
- ✓ Share **Homecare Provider Visit Import and Export Integration (v5) guides** with your EVV vendor to determine if integration can be done.
- ✓ Bookmark for future reference.



Scan and bookmark QR code!

Third-Party EVV Integration
Knowledge Base



Resources & Support

➤ NEW: NY EVV Compliance Info Hub

Homecare providers: here is your go-to source for the most up-to-date regulatory summaries, how-to guides, training videos, payer-specific information, and FAQs



A screenshot of the HHAeXchange website's 'New York EVV Compliance Info Center'. The header includes the HHAeXchange logo and navigation links for Providers, Payers, Caregivers, Resources, and Company, along with a 'Request a Demo' button. The main heading is 'New York EVV Compliance Info Center' with a New York state icon. A 'TABLE OF CONTENTS' sidebar on the left lists: OVERVIEW (selected), PROVIDER TRAINING & RESOURCES, EVV COMPLIANCE REPORTING, and NY PAYERS. The main content area is titled 'Overview' and contains the section 'What Is the NYS DOH EVV Mandate?'. This section explains that the New York State Department of Health (DOH) mandate is a new requirement for all health plans operating in New York to report on their Electronic Visit Verification (EVV) compliance data. It notes that this is a major shift in homecare compliance aimed at reducing fraud, waste, and abuse. It further states that if you are a home care provider delivering services to members of a New York-contracted health plan, this mandate sets new expectations for how visits are captured, verified, and reported. Finally, it mentions that as part of this mandate, health plans must submit quarterly reports on EVV compliance across their provider networks.

[NY EVV Compliance Info Hub](#)



Knowledge Base



- ✓ Review important resources found under **Documentation > V5**.
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Scan and bookmark QR code!

Third-Party EVV Integration Knowledge Base

Need Help?

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



Payer-Related Questions

Contact Payer Provider Relations

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

Reach out to your Payer's Provider Relations team.



HHAeXchange Questions

Contact HHAeXchange Support

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

Support@HHAeXchange.com



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

Questions?

thank you