Introducing HHAeXchange + Caregiver Mobile App



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HHAeXchange

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Introducing HHAeXchange+ Caregiver Mobile App

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speakers



Joe Spadoni

Role: Product Manager

Tenure at HHAeXchange: 2 yrs

Areas of Expertise: HHAeXchange+ Mobile

Fun Fact: I love Tiramisu!



George Marquez

Role: Sr. Training Specialist

Tenure at HHAeXchange: 7 yrs

Areas of Expertise: Visit Maintenance

Fun Fact: I love cheese steaks!

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agenda

- Introducing HHAeXchange+ Mobile App
- Migration Overview: What to Expect
- New Caregiver Setup & Mobile User Management (+)
- Scheduled Visit Workflow
- New & Upcoming Features & Enhancements
- Key Takeaways & Resources
- Q&A

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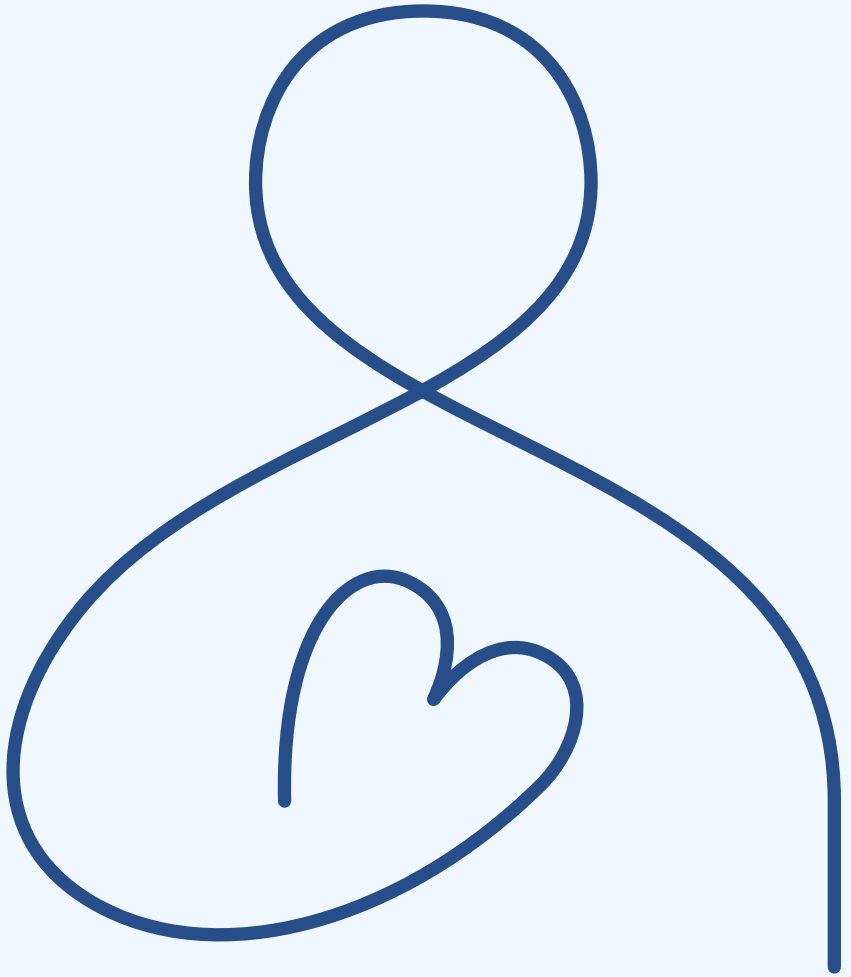
Overview

This session introduces the new HHAeXchange+ Mobile app.

We'll review key updates, migration, what is changing from the current app, and what is coming next!

Who should take this training?

Home care agency coordinators, administrators, supervisors, & EVV oversight and operational staff.



Mission



To introduce the new **HHAeXchange+ Mobile app** and show how its enhanced features improve EVV, streamline caregiver workflows, and strengthen operational visibility for agencies.

Objectives

By the end of this session, participants will be able to:



Apply

Use the HHAeXchange+ Mobile app to support accurate EVV visit capture and streamline caregiver workflows.



Identify

Recognize key differences between the existing HHAeXchange Mobile app and the new Mobile+ experience, and usability.



Understand

Explain how HHAeXchange+ Mobile app features, caregiver profile updates, and mobile user management support more efficient agency operations.



Leverage

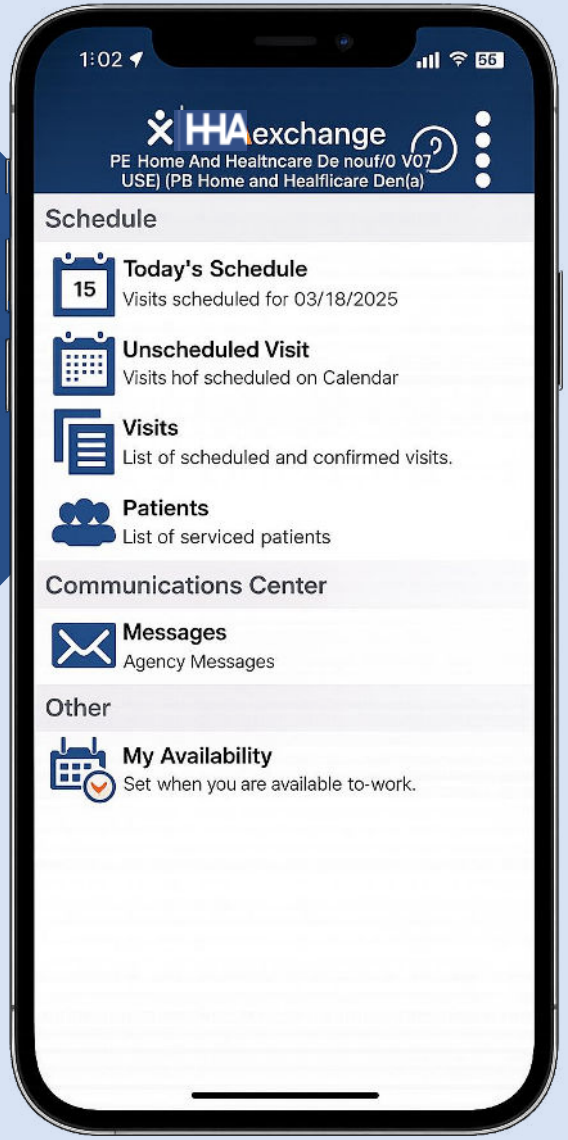
Use upcoming innovations such as offline mode, Direct Chat, and clusters to enhance the mobile experience.

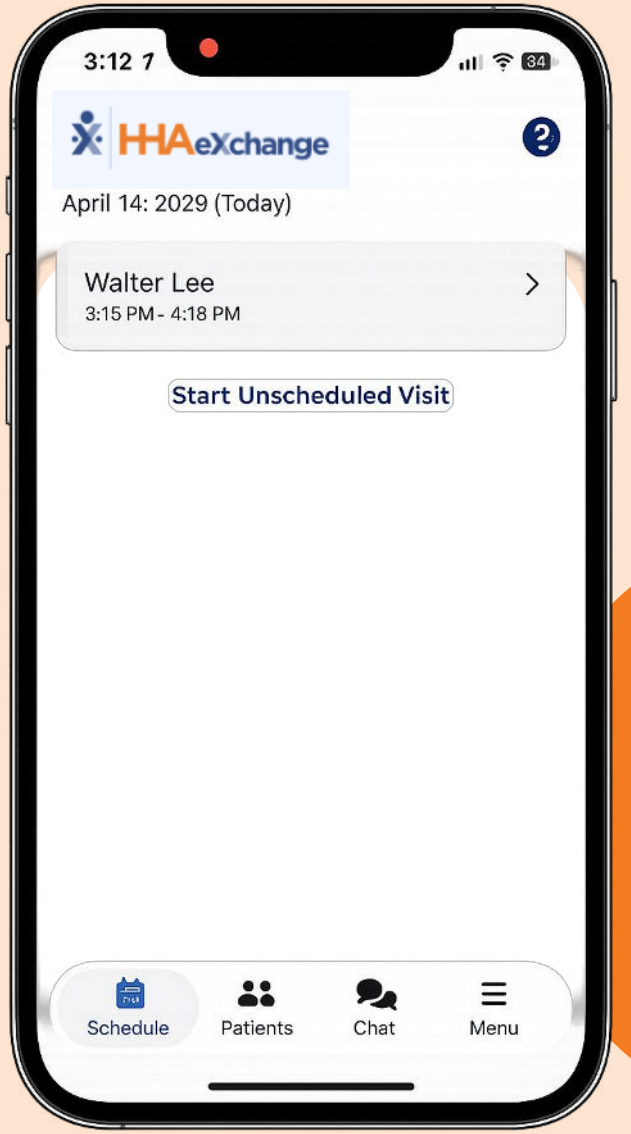


Introducing HHAeXchange+ Mobile App

New HHAeXchange+ Experience

Out with the OLD!





In with the NEW!

HHAeXchange+ Mobile App Experience

Caregiver Challenges

- Clunky paperwork or confusing tech.
- Missed EVV and compliance risks.
- Language barriers.

HHAeXchange+ Benefits

- Simple intuitive interface.
- Push notifications, GPS accuracy ensure EVV compliance.
- Reliable offline mode keeps visits on track regardless of data.
- App available in 23 languages.

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Migration Date Advisory

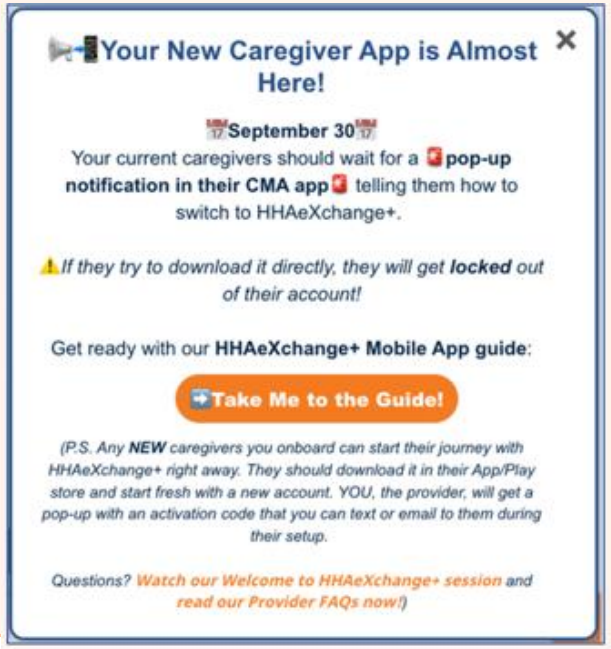
Before migration date: prepare caregivers before go-live.

Use this prep notice to answer questions before caregivers switch.

1 BEFORE MIGRATION DATE

PREP NOTICE

Current caregivers keep using the current app until they see a switch prompt.



Caregiver message	Agency action
Wait for the in-app notification. Do not download HHAeXchange+ directly before the prompt appears.	Prepare staff, review the guide, and answer questions before go-live.

Important reminder — If current caregivers download HHAeXchange+ directly before the prompt, they may get locked out.

KEY TAKEAWAY — Before go-live: current caregivers wait for the switch prompt before moving to HHAeXchange+.

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Migration Date Advisory

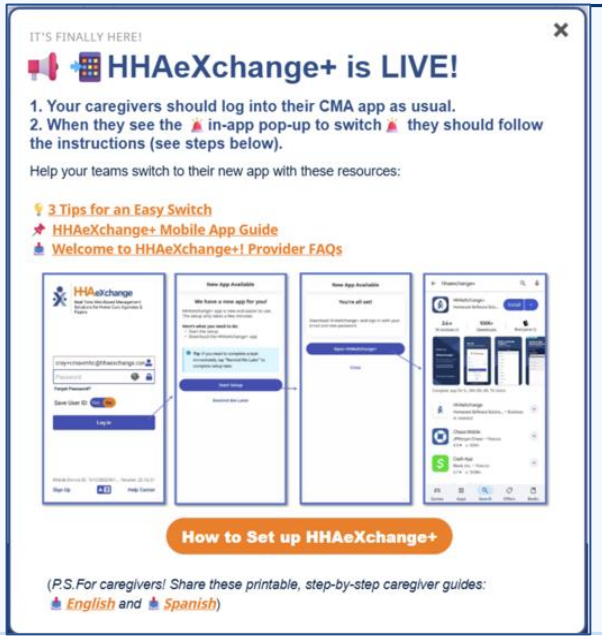
Go-live day: caregivers switch when the live notification appears.

On go-live day, this pop-up tells caregivers when to start the move.

2 LIVE MIGRATION NOTIFICATION

GO-LIVE

When HHAeXchange+ is live, caregivers follow the prompt to switch.



Caregiver message

Log into the current app as usual. Then follow the switch instructions when the pop-up appears.

Agency action

Share setup resources and confirm caregivers' complete registration in HHAeXchange+.

What changes now?

The caregiver can now move from the current app into HHAeXchange+ and complete registration.

KEY TAKEAWAY Go-live: log into the current app, follow the live prompt, and complete HHAeXchange+ setup.

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Before You Migrate

Which HHAeXchange mobile app are you using?

Not sure? Check the app icon on your mobile device. This will help you prepare for a smooth transition.

HHAeXchange Mobile App

Current App

Using this today to track visits.

HHAeXchange

Download on the App Store

GET IT ON Google Play



Agencies will see the Mobile ID in the caregiver profile.

Caregivers will wait for a notification on the app to start migration. **No activation code required.**

HHAeXchange+ Mobile App

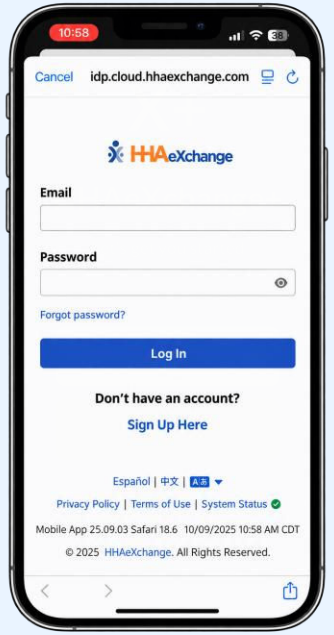
New App

New, improved app with an enhanced caregiver experience.

HHAeXchange+

Download on the App Store

GET IT ON Google Play



Agencies will send the activation code for new caregivers.

New Caregivers will download the HHAeXchange + app and wait for the activation code.

KEY TAKEAWAY

Check the app icon to know which app you are using.
The current app uses a Mobile ID. The new app uses an Activation Code.

Need help?

Contact your HHAeXchange Client SupportTeam.

> Remaining Waves — Migration Schedule

Providers and CMA users by wave and caregiver migration date

Wave Migration / Caregiver Group	Portal Migration	CG Migration
Wave 4 — PA	**9/8**	**4 caregiver groups**
Group 1		9/15
Group 2		9/29
Group 3		10/6
Group 4		10/13
Wave 5 — NY	**9/9**	**4 caregiver groups**
Group 1		9/16
Group 2		9/30
Group 3		10/7
Group 4		10/14
Wave 6 — NJ	**10/20**	**10/27**
Golden Years (MA)	**9/13**	**9/14**
TOTAL		

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Audience Poll !

Which app are your caregivers using?

HHAeXchange Mobile

Current app

HHAeXchange+ Mobile

New app

Both

Already Started Migration

Current + New app

Neither / Not sure

Need guidance

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Migration Overview: What to Expect

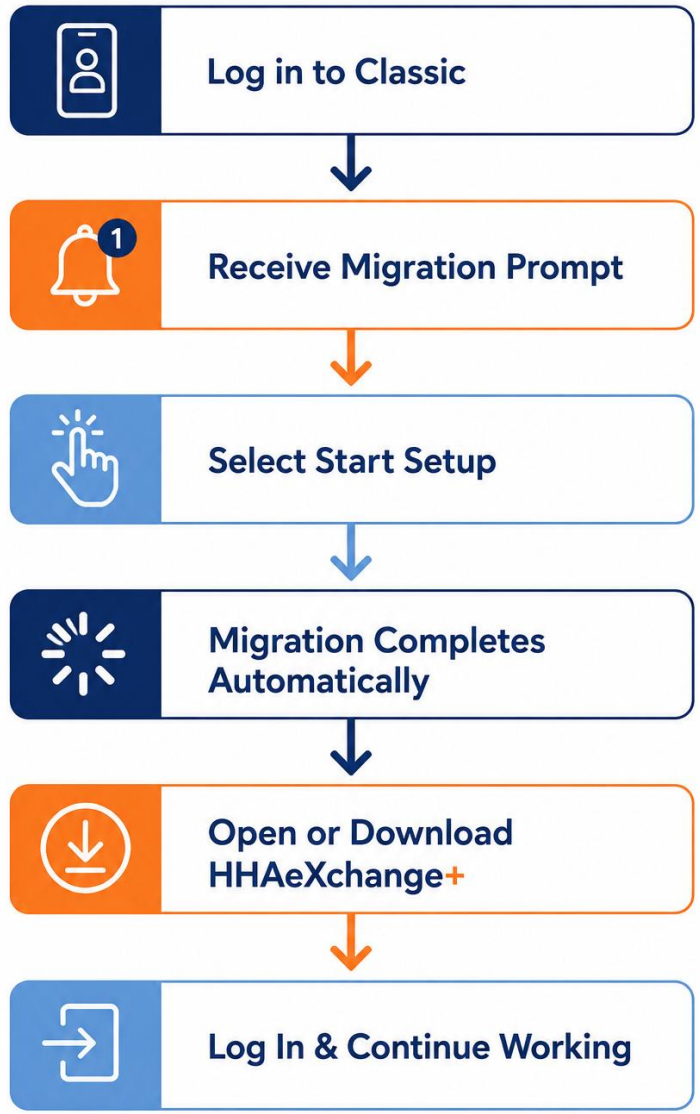
Preparing for the Transition

- **You'll be notified when it's your turn to migrate.**
- **Current caregivers** will move automatically from the HHAeXchange mobile app.
- **Your caregiver information** will transfer automatically.
- **New caregivers** will download and begin using **HHAeXchange+** after your agency's migration.



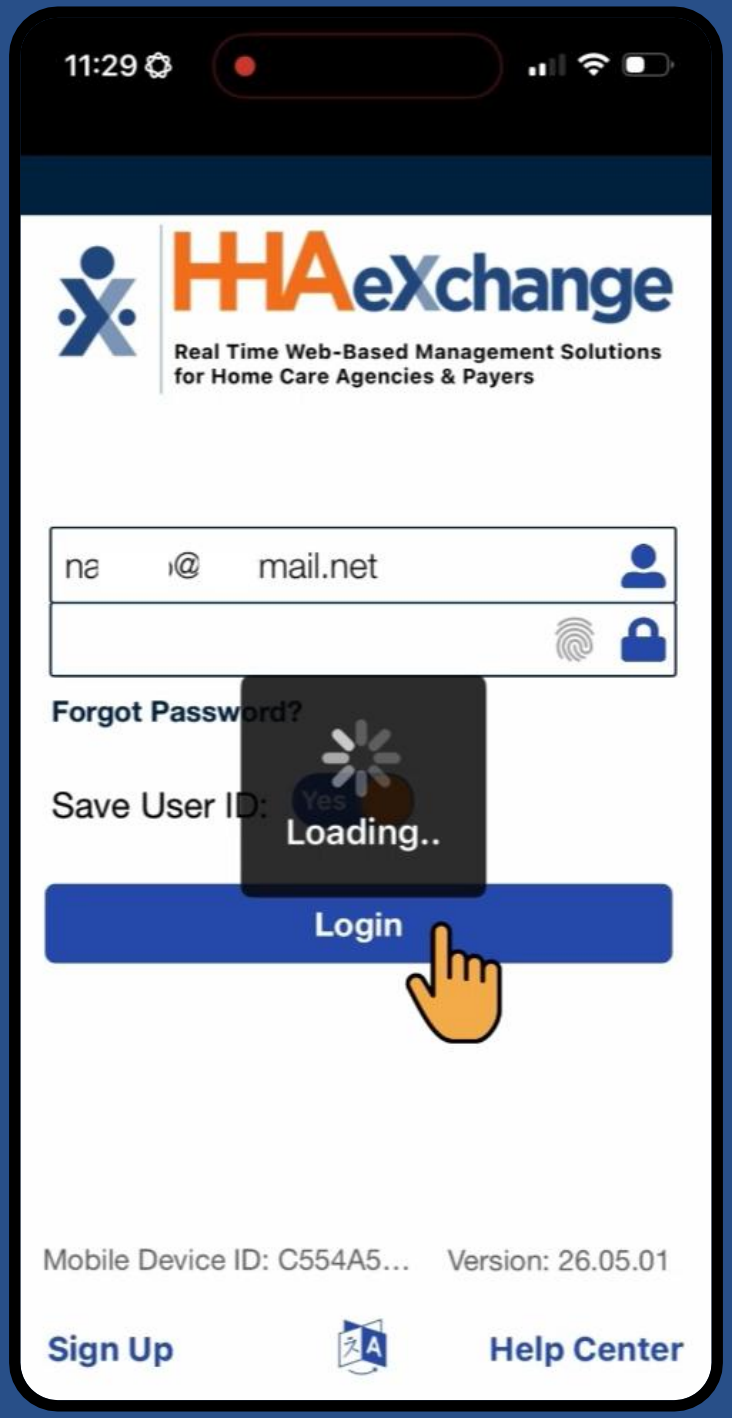
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Migration at a Glance



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Setup Your HHAeXchange+ Mobile App



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Scenario 1 Existing Caregiver

Works with Multiple Agencies



Example: Maria

Maria is an existing agency and works for Agency A(Cohort 1) and Agency C(Cohort3).



These agencies are migrating at different dates. The **earliest date** determines the agencies transition

1 Works for Multiple Agencies



Maria works for Agency A (Cohort 1) and Agency C (Cohort 2)

2 Gets Prompt on Earlier Date



Maria will receive the prompt on Cohort 1's date not Cohort 2.

3 Switches both at Once



When Maria transition she transition for both agencies.

KEY TAKEAWAY For Existing Agencies working for multiple agencies the earliest migration date applies.

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Scenario 2 New Caregiver

Joins after Agency has migrated



Example: Sam

Sam is a new caregiver joining an agency that has already migrated to the new app.



Since the agency is already on the new app, Sam starts there from day one.

1 New Caregiver Hired



Sam joins an agency that has already migrated.

2 Starts on New APP



Sam starts directly in the new app.

3 No Migration Required



Sam does not receive a migration prompt.

✓ KEY TAKEAWAY **New caregivers joining after migration start directly in the new app — no migration prompt or old app is required.**

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Caregiver Export Report

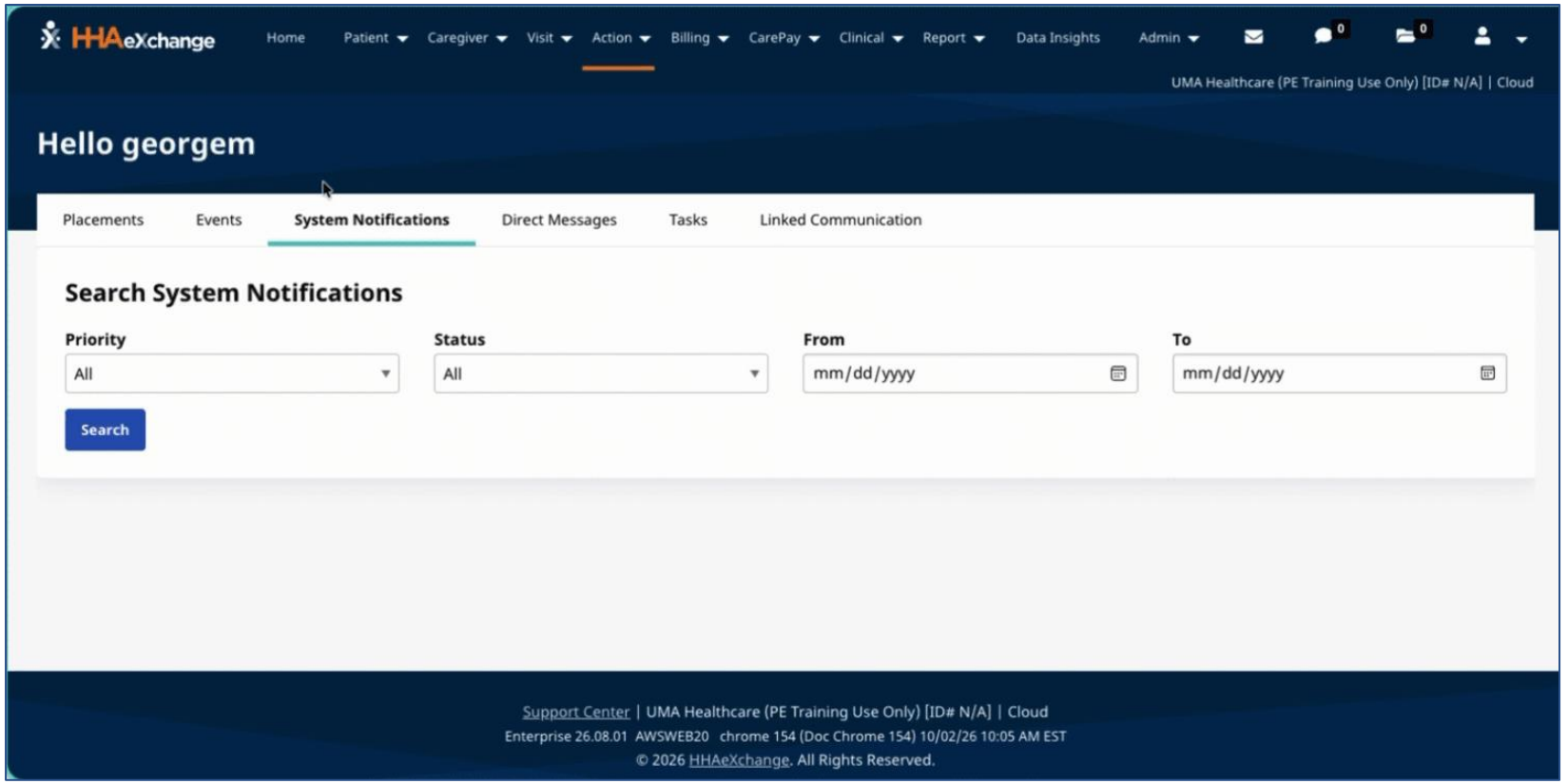
Quick job aid

Export caregiver records from the caregiver search results in three quick steps.

How to export

Follow this path after choosing the caregivers you need.

1. **Open Caregiver Search**
2. **Run the search**
3. **Export results**



KEY TAKEAWAY **Search first, confirm the right records, then export from Bulk Actions.**

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Caregiver Search Export Report

B	C	D	E	F	G	H	I
Caregiver C	Discipline	Address	Phone	Email	Contact-M	Status	App Version
KHC-1005	PCA, HHA	FRISCO, TX, 7	--	--	--	Active	HHAExchange+
UMA-1062	PCA, HHA, RI	BIRMINGHAN	564-789-784	--	Mobile/Text	Active	HHAeXchange+
KHC-1094	PCA, HHA, P	MIAMI, FL, 33	786-229-006	--	Mobile/Text	Active	HHAeXchange+
KHC-1106	PCA, HHA	MACOMB, MI	--	bzidane01@y	Email	Active	HHAeXchange+
434-1110	PCA	3520 Ellwooc	978-578-003	leonardson@	Mobile/Text	Active	HHAeXchange+
434-1111	PCA, HHA, RI	AUSTIN, TX, 7	714-422-608	--	Mobile/Text	Active	HHAeXchange+
KHC-1112	PCA, HHA, H	TULSA, OK, 7	--	alejandra03(	Email	Active	HHAeXchange+
KHC-1114	PCA, HHA, RI	CURTISVILLE	786-229-006	wleeucp@ya	Email	Active	HHAeXchange+
434-1116	PCA, HHA, RI	BOSTON, MA	781-521-599	sleonardson(	--	Active	HHAeXchange+
434-1117	PCA, HHA, RI	LYNN, MA, 0	781-521-599	teavyleonard	Mobile/Text	Active	HHAeXchange+
KHC-1118	PCA, HHA	9660 Little BI	229-834-438	snaik@hhae	Mobile/Text	Active	HHAeXchange+
434-1119	PCA, HHA, H	AUSTIN, TX, 7	714-422-608	choashley27	Email	Active	HHAeXchange+
KHC-1131	RN, OT	SIOUX CITY, I	--	avital.sykora	--	Active	HHAeXchange+
KHC-1133	PCA, HHA	SAINT PAUL,	--	asykora@hha	--	Active	HHAeXchange+
KHC-1134	PCA, HHA, RI	MORGANVILI	--	jsachani@hh	Email	Active	HHAeXchange+
UMA-1135	PCA, HHA	WEST NEW Y	201-966-005	fmelendez36	--	Active	HHAeXchange+
KHC-1138	PCA, HHA, RI	25 CAREGIVE	781-521-599	sleonardson(	Email	Active	HHAeXchange+

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Best Practices for Successful Migration

- Watch for your migration notification. You'll be notified when it's your agency's turn to migrate.
- Encourage caregivers to migrate before or after a shift.
- Remind caregivers they can choose Remind Me Later if needed.
- Enable location services and push notifications.



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Need More Information?

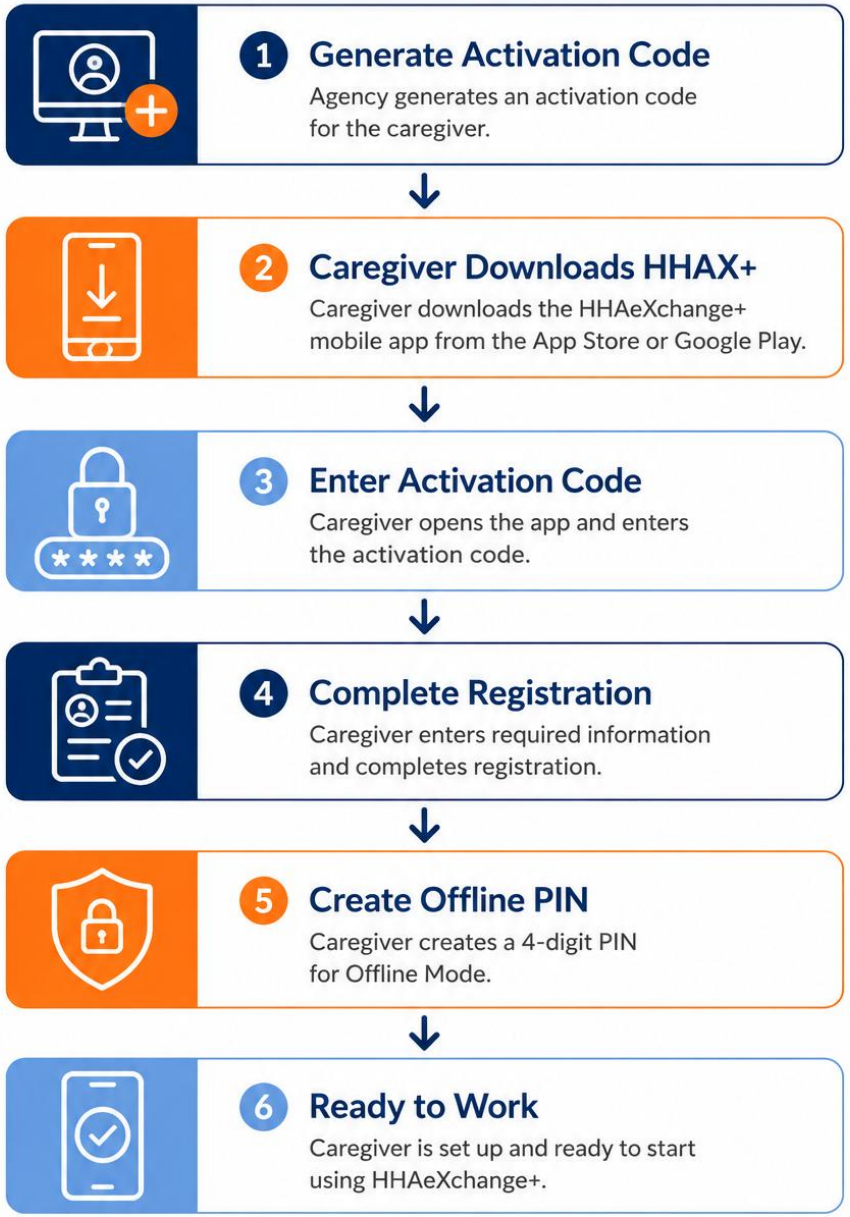
LEARN MORE

Switching to the NEW Mobile App (HHAeXchange+)



New Caregiver Setup & Mobile User Management (+)

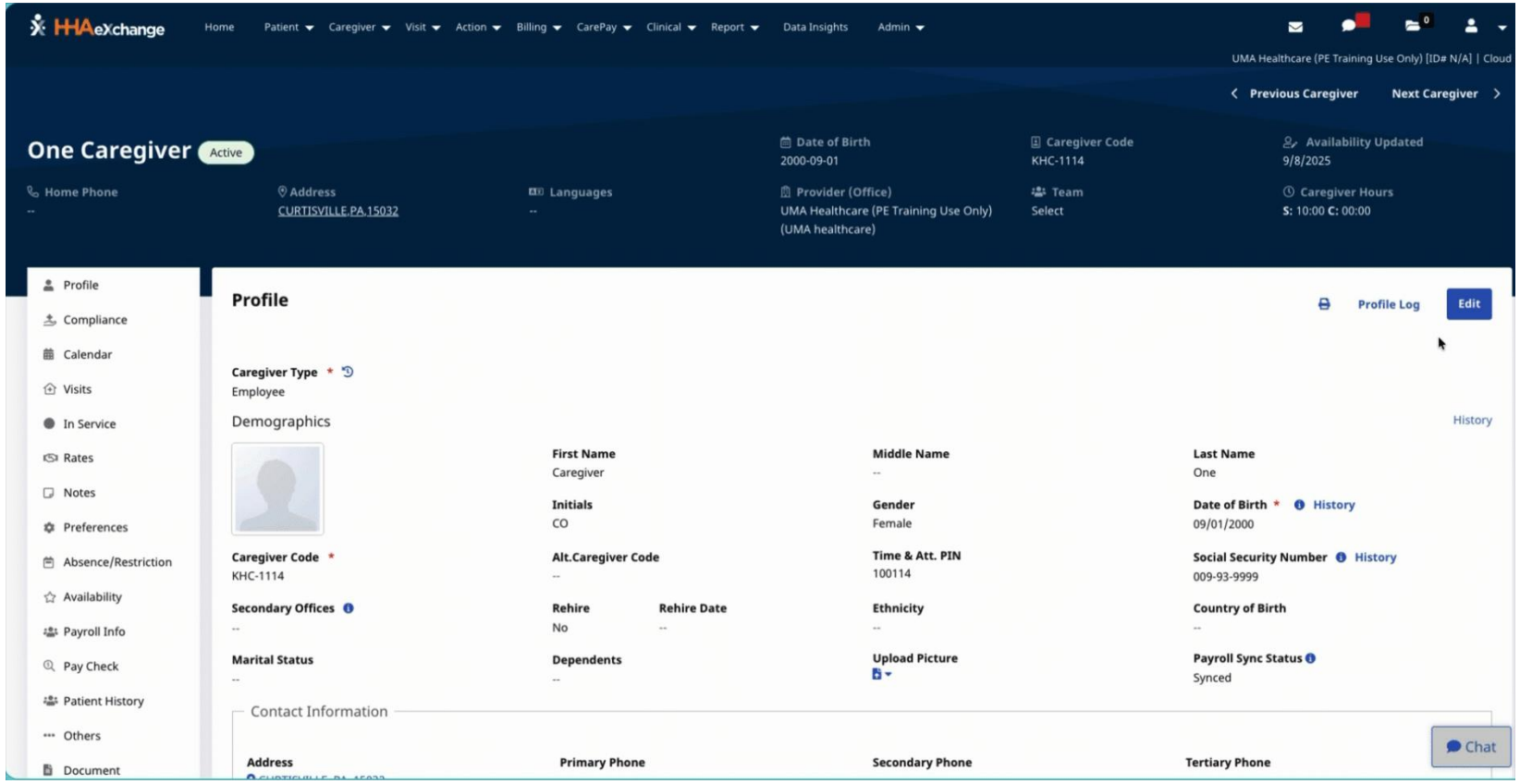
New Caregiver Registration at a Glance



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Setting Notification Preferences

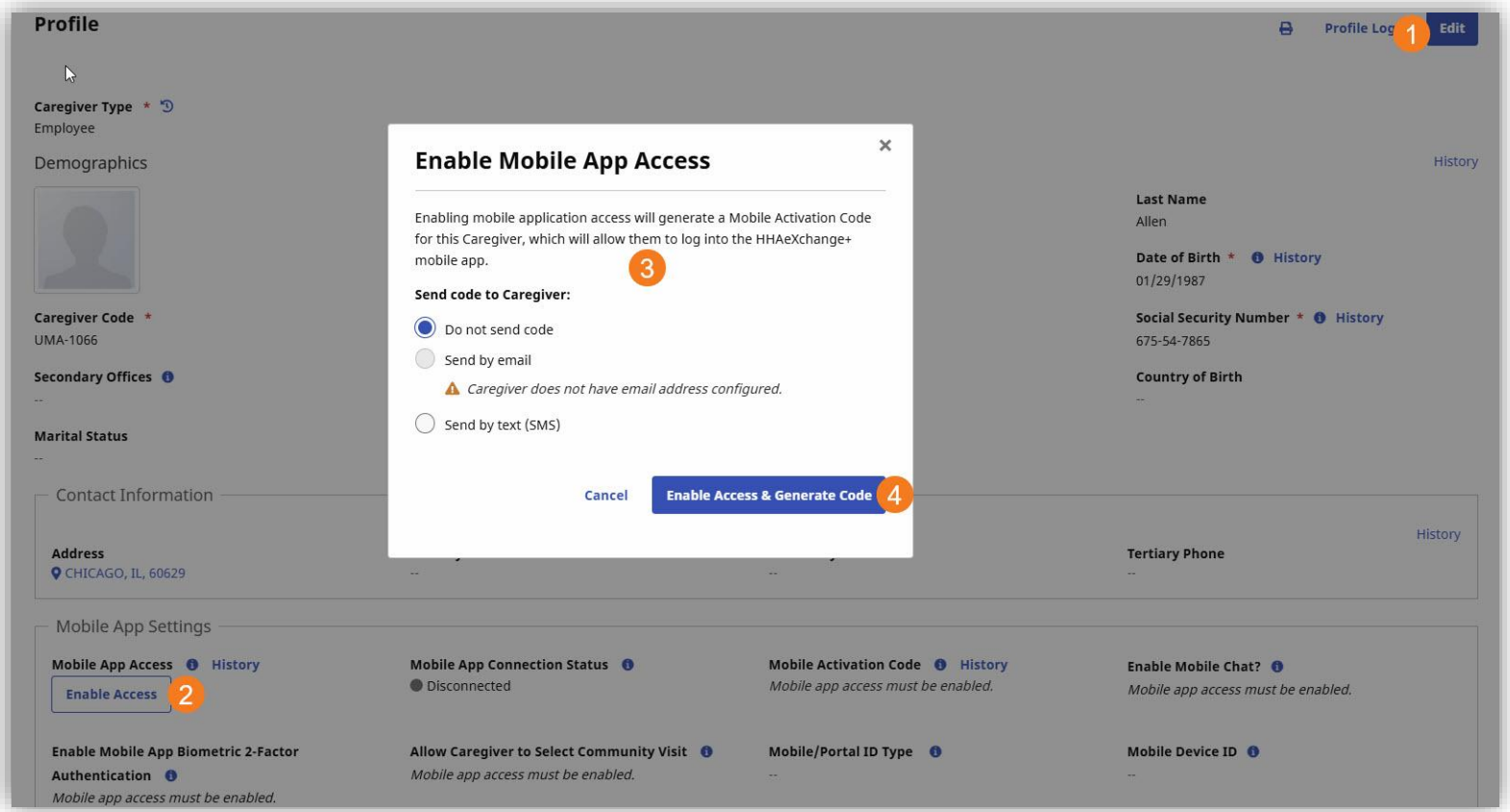
1. Open the caregiver profile and select **Edit**.
2. Go to the **Notification Preferences** section.
3. Set the **Preferred contact Method** to either **Email** or **Mobile/Text Message.**
4. Add the **Email** and/or **Mobile text fields**
5. Select **Save.**



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Generate an Activation Code

1. Open the caregiver profile.
2. Select **Enable Access & Generate Code**.
3. Send the activation code based on the caregiver's notification preference.



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One Caregiver

Active

Home Phone --	Address CURTISVILLE,PA,15032	Languages --	Provider (Office) UMA Healthcare (PE Training Use Only) (UMA healthcare)	Team Select

Date of Birth: 2000-09-01

Caregiver Code: KHC-1114

Availability Updated: 9/8/2025

Caregiver Hours: **S:** 10:00 **C:** 00:00

Profile
Compliance
Calendar
Visits
In Service
Rates
Notes
Preferences
Absence/Restriction
Availability
Payroll Info
Pay Check
Patient History
Others
Document

Profile

Profile Log | Edit

Caregiver Type * History
Employee

Demographics

History

First Name Caregiver	**Middle Name** --	**Last Name** One	
Initials CO	**Gender** Female	**Date of Birth** * History 09/01/2000	
Caregiver Code * KHC-1114	**Alt.Caregiver Code** --	**Time & Att. PIN** 100114	**Social Security Number** History 009-93-9999
Secondary Offices --	**Rehire** No	**Rehire Date** --	**Ethnicity** --
Country of Birth --	**Marital Status** --	**Dependents** --	**Upload Picture**
Payroll Sync Status Synced			

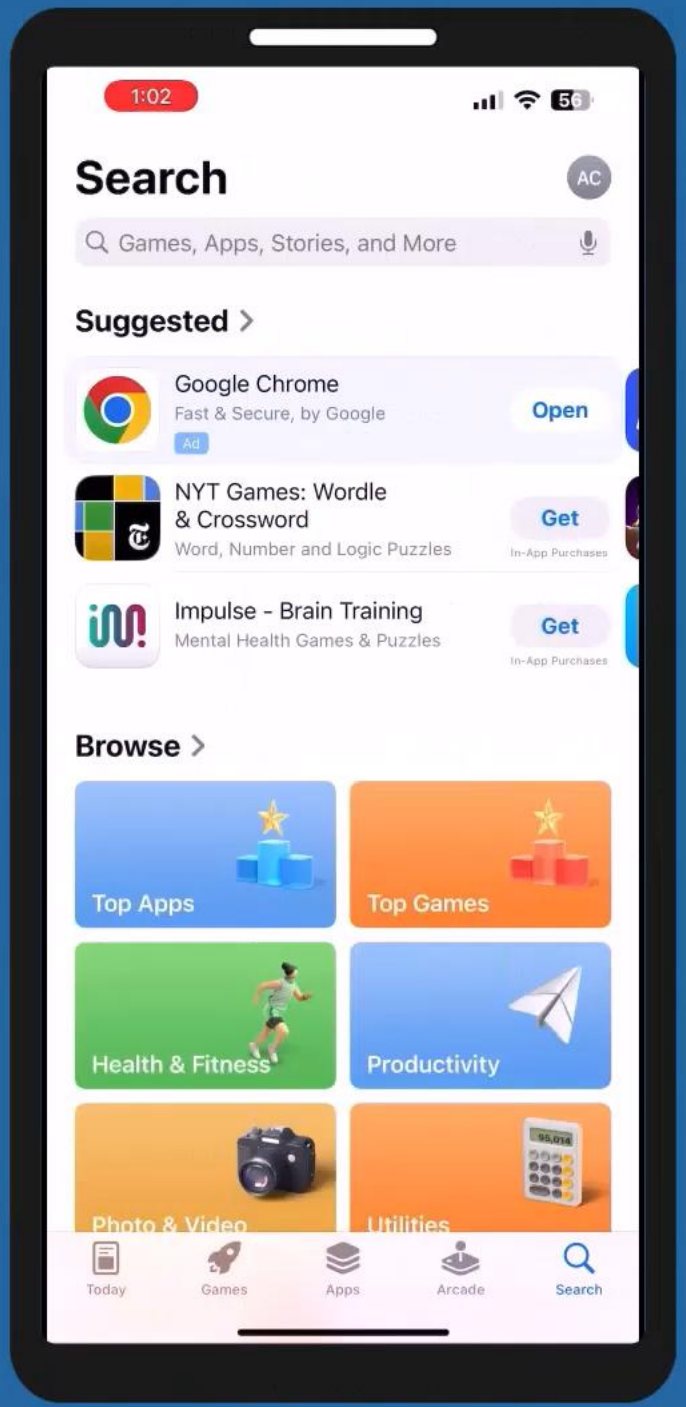
Contact Information

Address	Primary Phone	Secondary Phone	Tertiary Phone

Chat

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Download, Sign Up & Register for HHAeXchange+



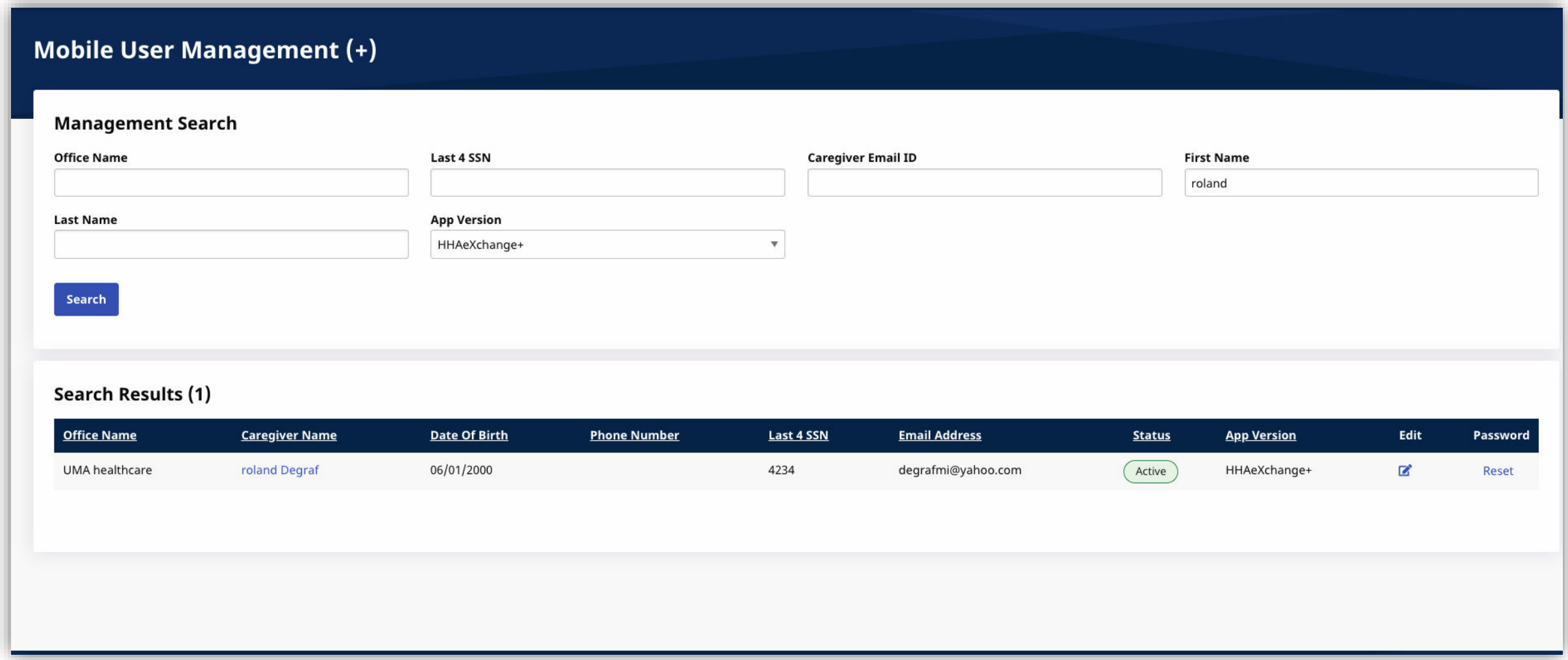
Managing Mobile App Users

Mobile User Management (+)

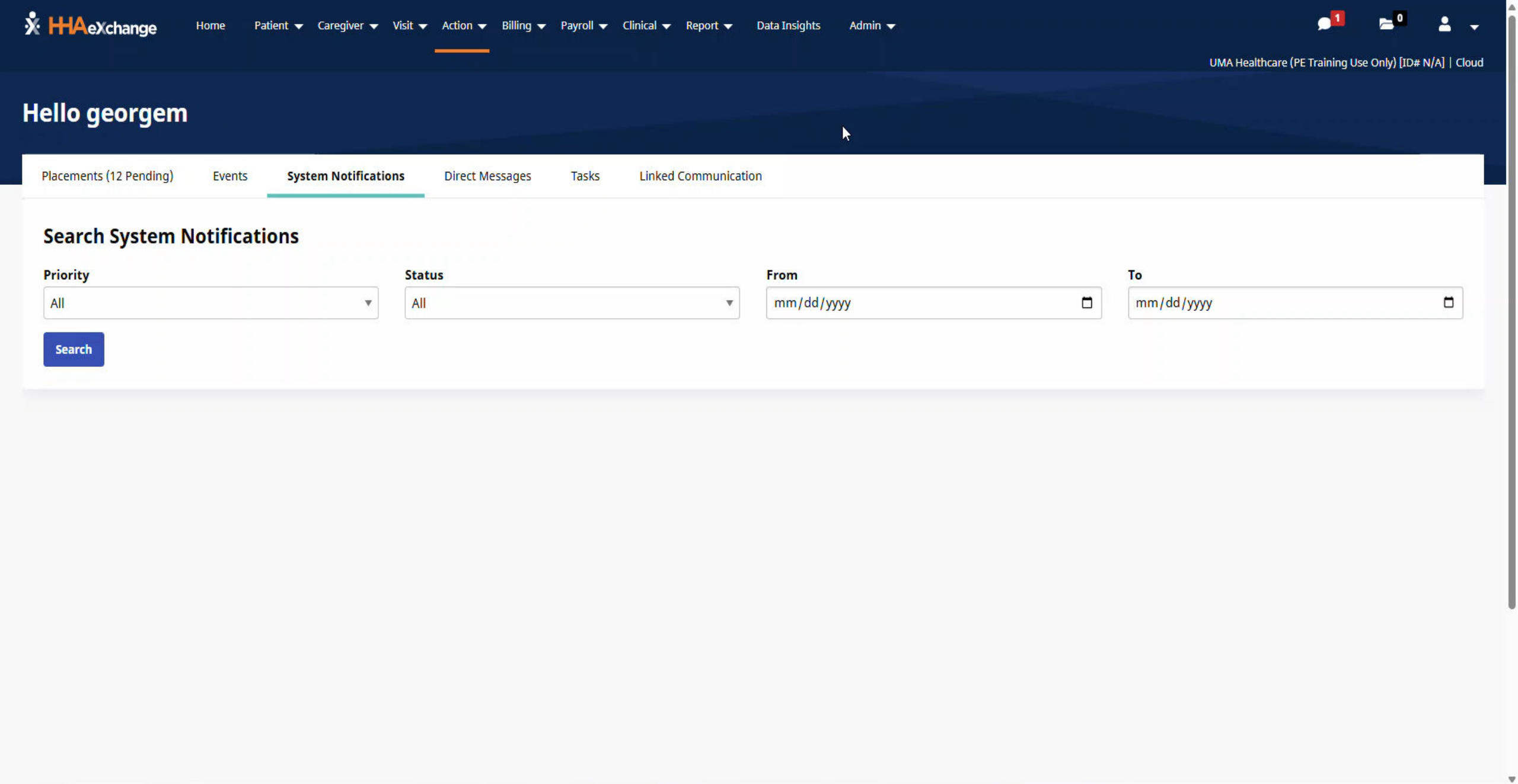
Provides a centralized place to manage caregivers using HHAeXchange+.

- Search for mobile app users
- View caregiver app status
- Verify app version
- Update caregiver demographic information
- Reset passwords

Mobile User Management (+)



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Scheduled Visit Workflow

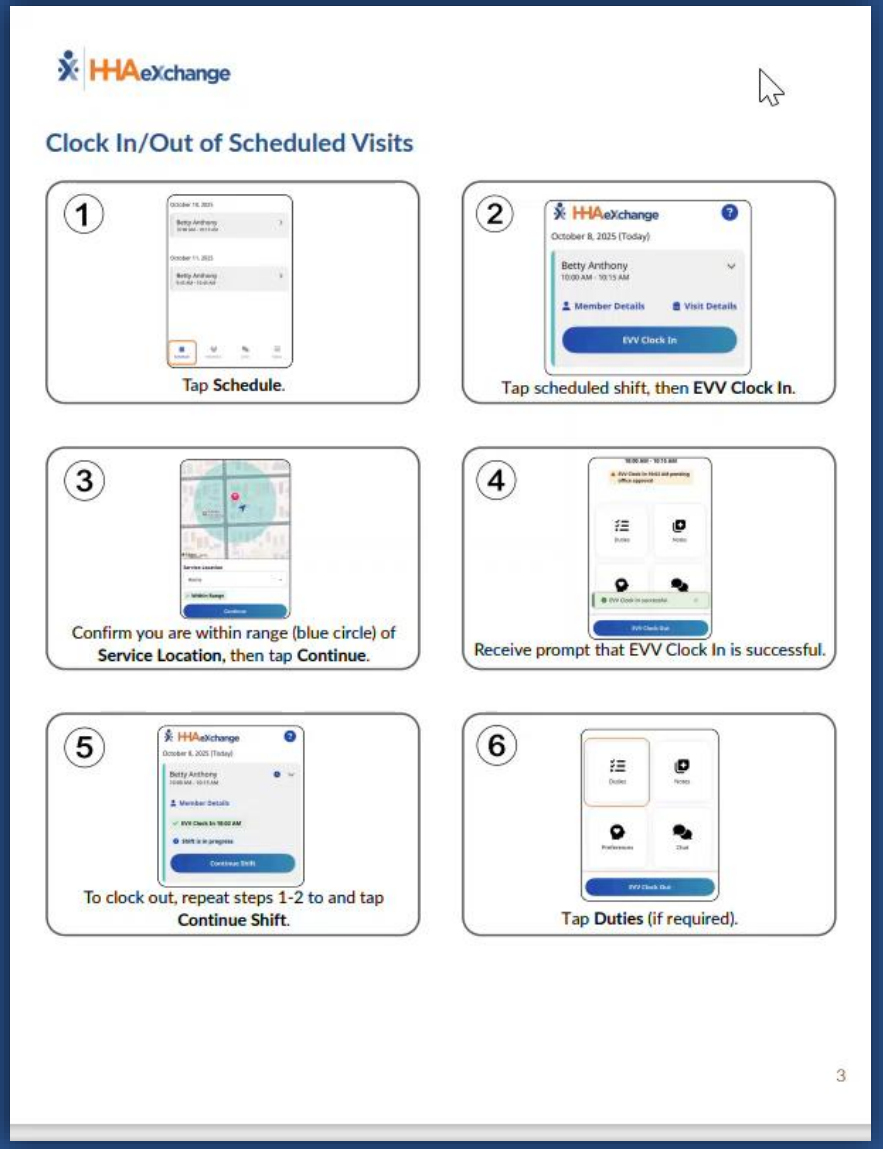
Visit Capture: Scheduled Visit

Scenario:

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

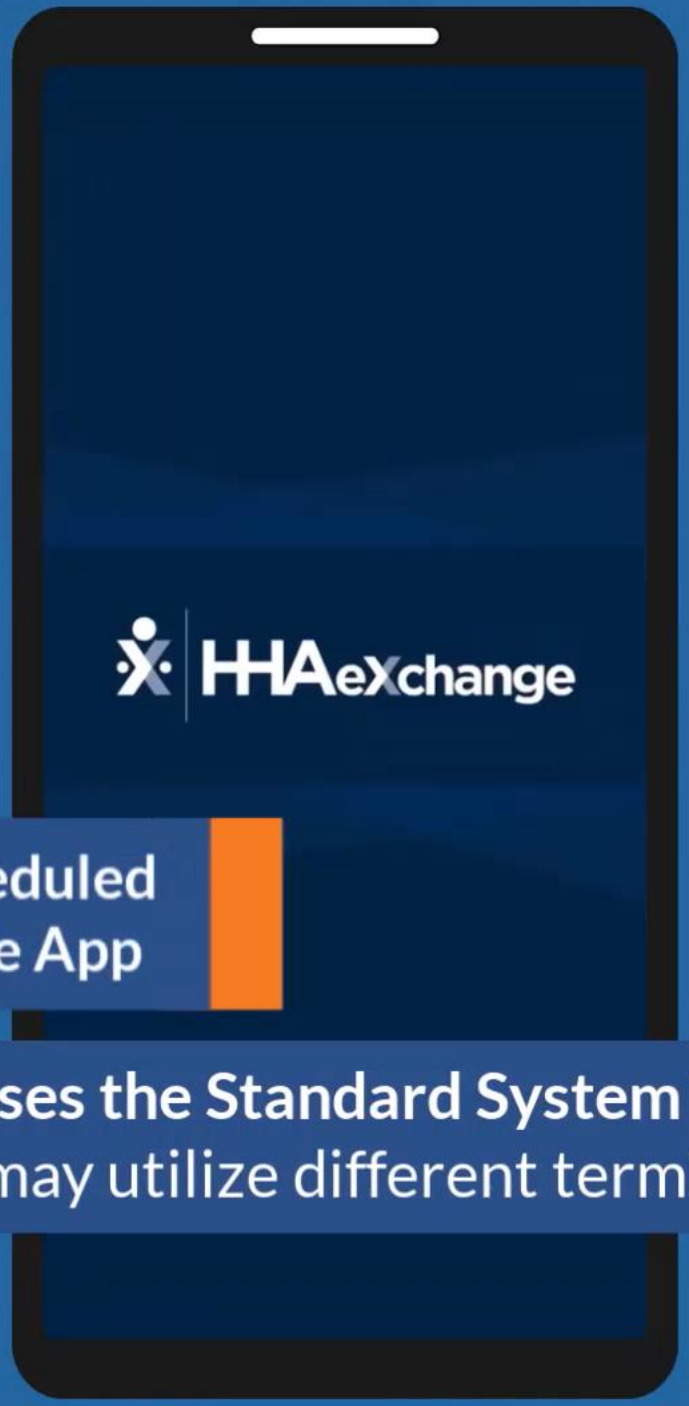
Using the **HHAeXchange+ Mobile App**, they will:

- Select the scheduled visit
- Clock In using **EVV**
- Complete any required duties/tasks (if applicable)
- Clock Out when the visit is finished



HHAeXchange+ Caregiver User Guide

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How to Clock In and Out for a Scheduled Visit in the HHAeXchange+ Mobile App

This video uses the Standard System Terminology

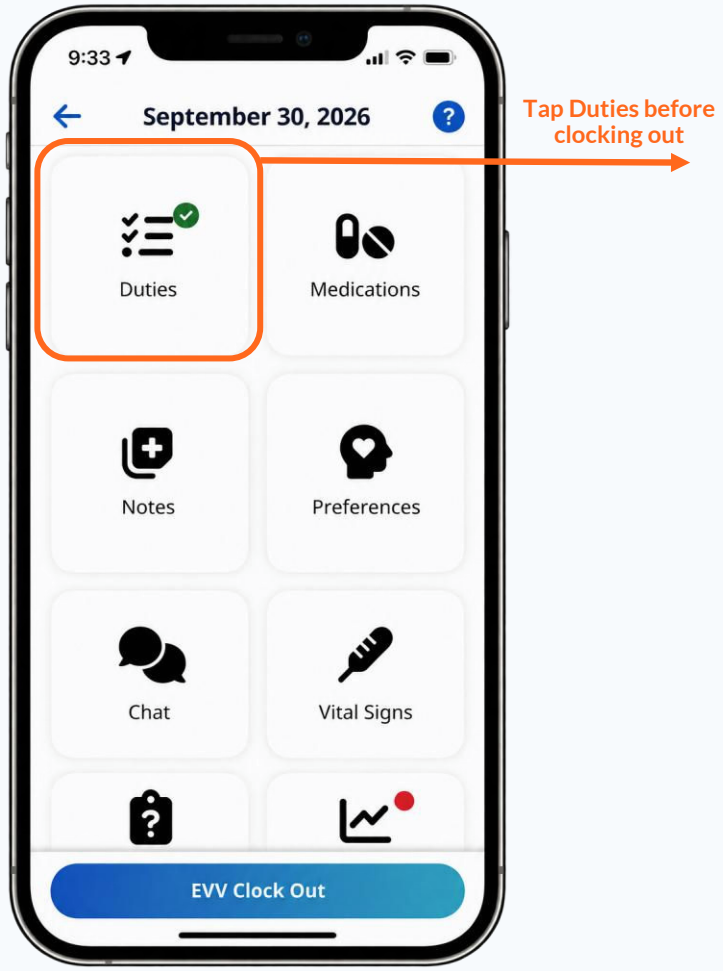
*Your state or payer may utilize different terminology in the platform

Plan of Care/Duties

The duties step happens after the continue visit button is pressed.

Where duties appear

Visit screen before clock out



Simple workflow If Duties need to be entered, select the Duties Tile.

1 Tap Duties

From the visit screen, select the Duties tile before pressing EVV Clock Out.

2 Review and save duties

If a POC was used It will be displayed here if not the caregiver can select other duties.

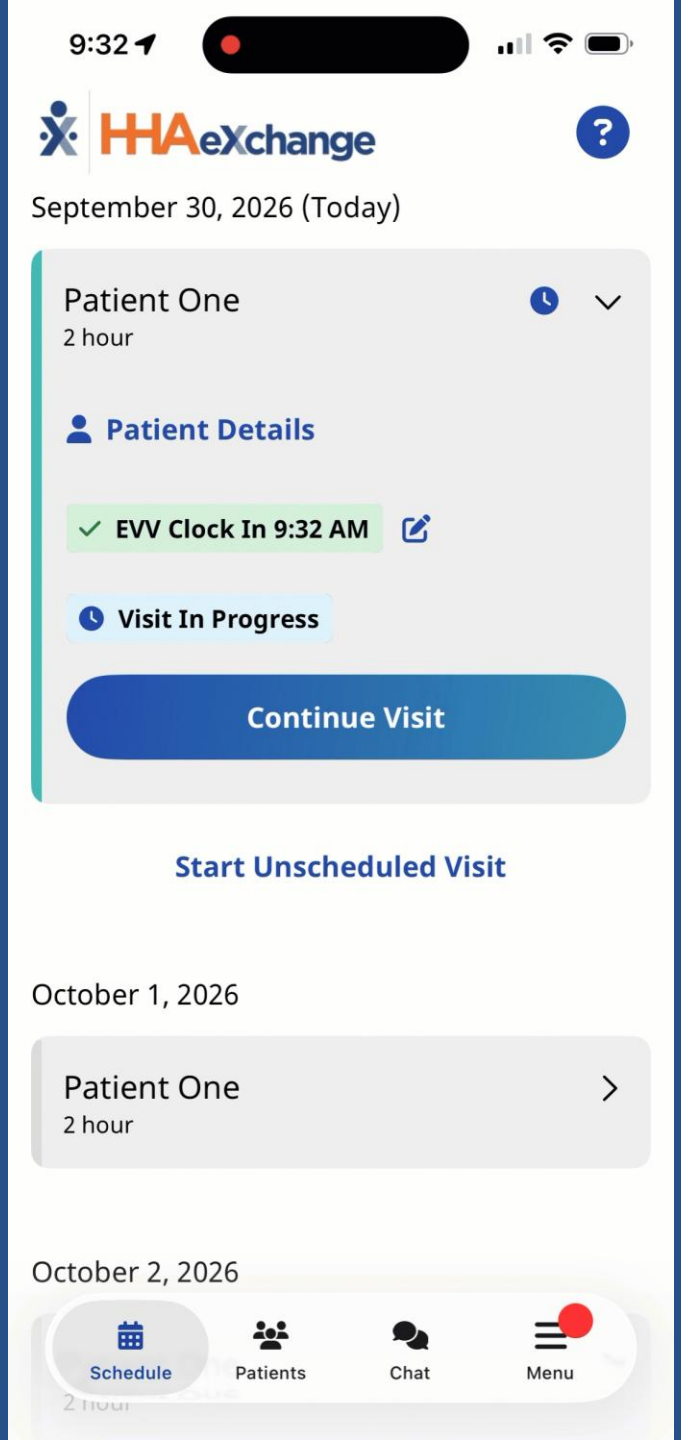
3 Then clock out

Return to the visit screen and tap EVV Clock Out to complete the visit.

KEY RULE **Duties are entered BEFORE completing Clock Out — not after.**

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Plan of Care/Duties in HHAeXchange+





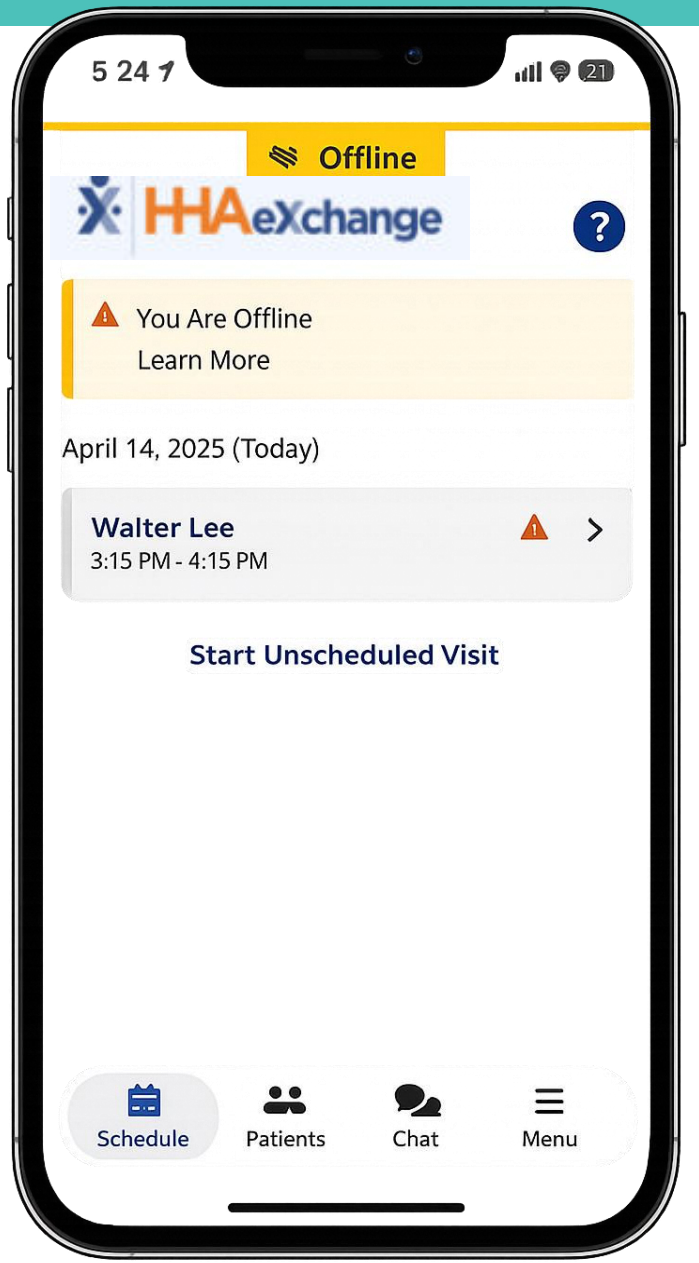
Enhanced Features

Enhanced Feature: Offline Mode

Offline Mode

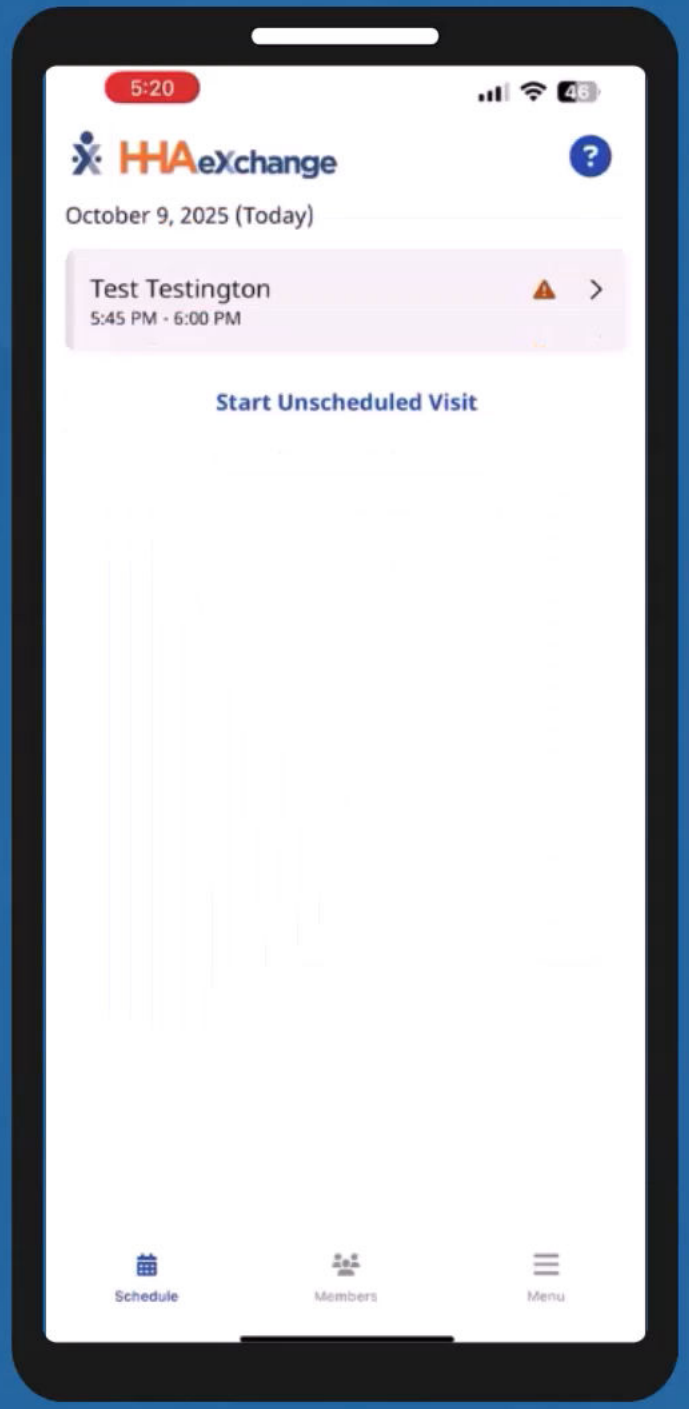
- **No signal? No problem.** Caregivers can complete EVV clock-ins and clock-outs without connectivity.
- Reliable offline access. Secure Offline PIN login keeps visits on track until connectivity is restored.

[HHAeXchange+ Caregiver User Guide]



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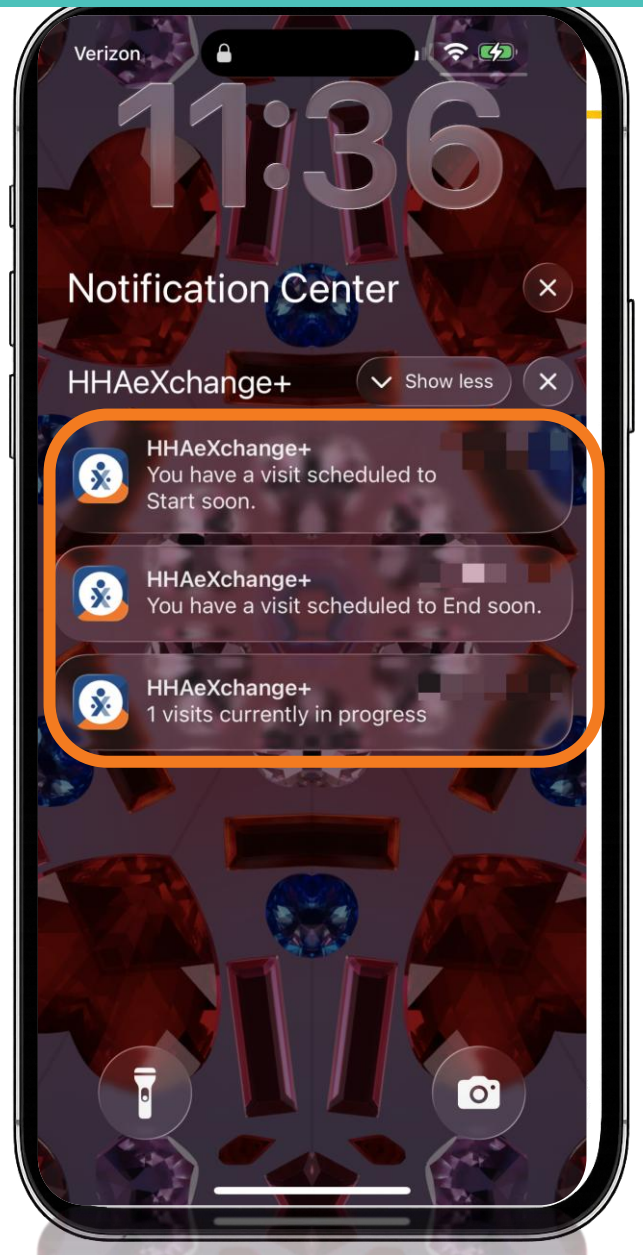
Offline Mode in HHAeXchange+



Enhanced: Push Notifications

Push Notifications

- **Real-time** reminders help caregivers stay on track at visit start and end.
- Smart prompts support more timely, accurate EVV completion.
- Fewer missed steps for caregivers. Less follow-up for agencies.

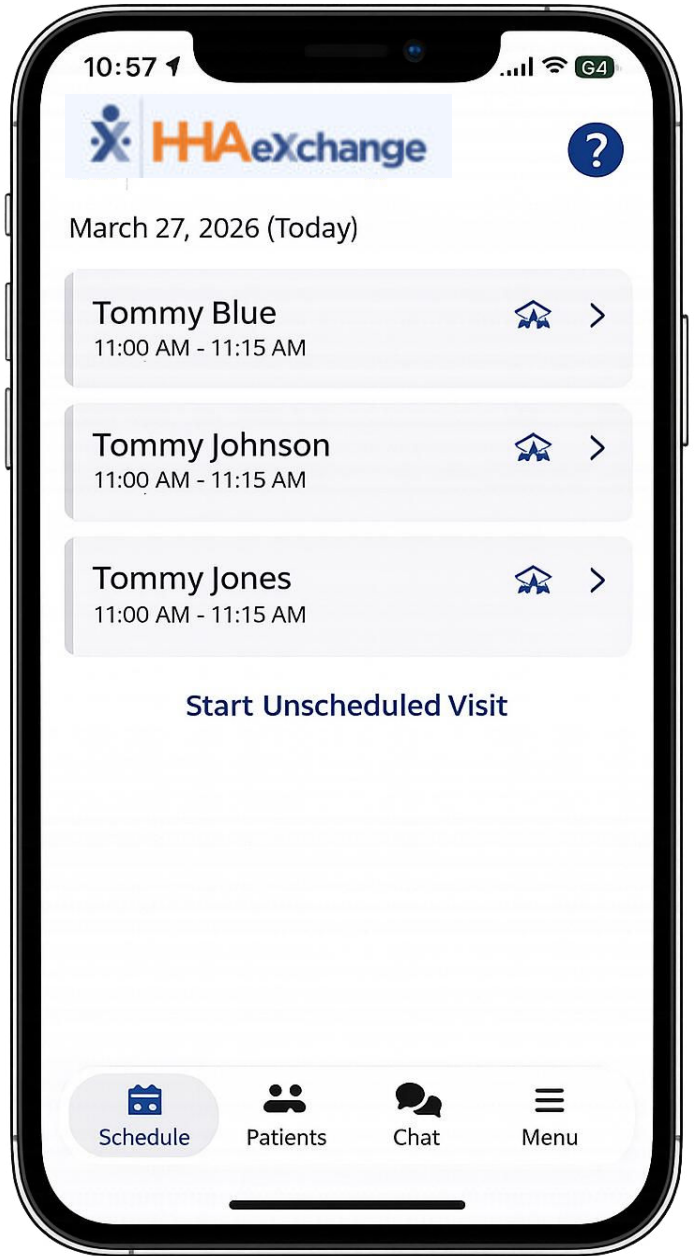


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Enhanced Feature: Clusters

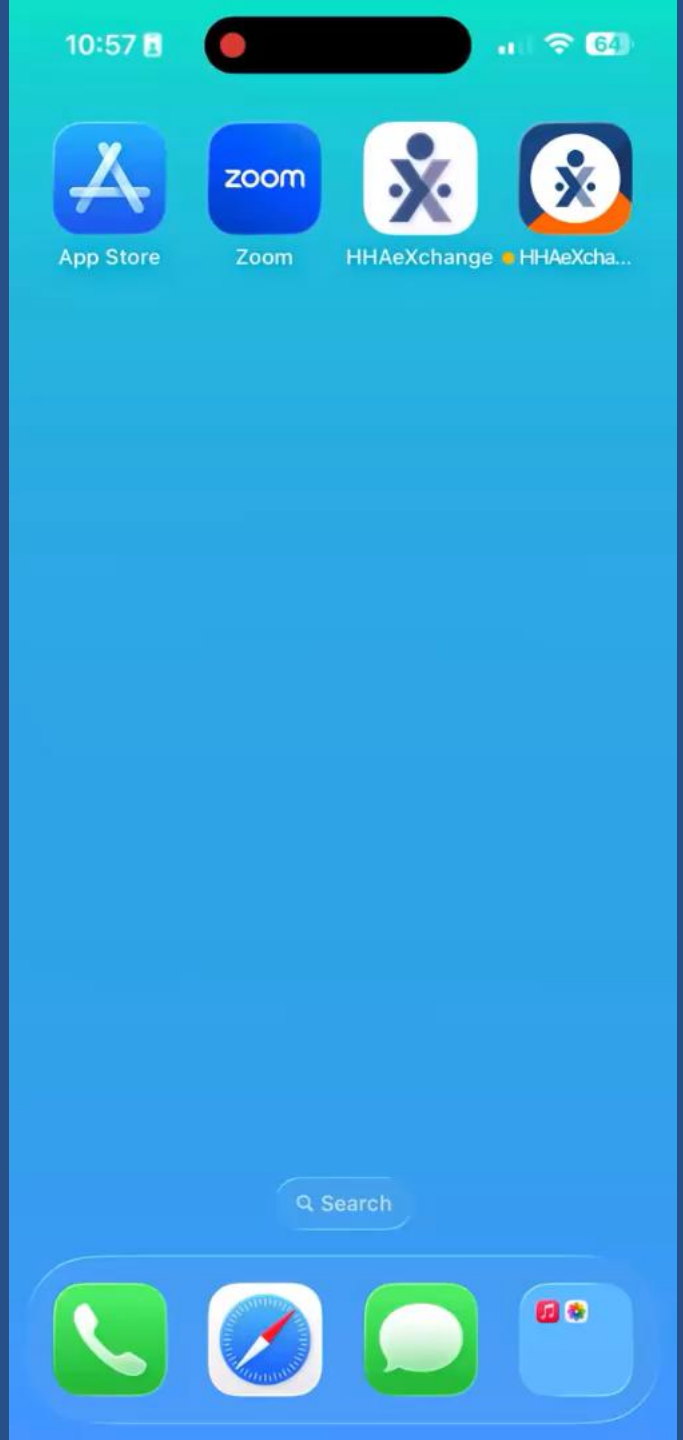
Clusters

- Complete EVV for multiple patients in one streamlined workflow.
- Fewer repetitive steps means faster action in the field.
- Updated UI makes cluster visits simpler, quicker, and easier to manage.



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Clusters
in
HHAeXchange+



Enhanced Feature: Direct Chat

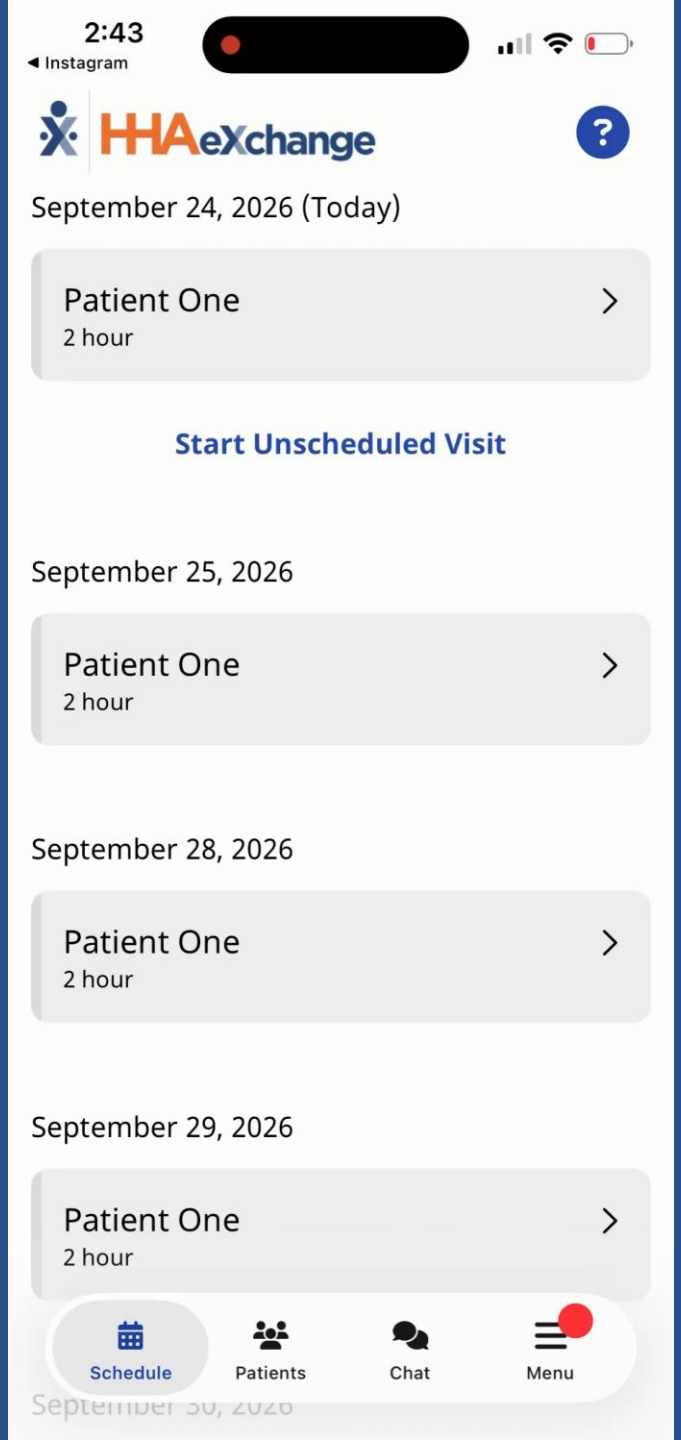
Direct Chat

- Connect with caregivers through two-way chat.
- Stay in the loop on visit changes.
- Keep caregivers informed when visits are canceled.



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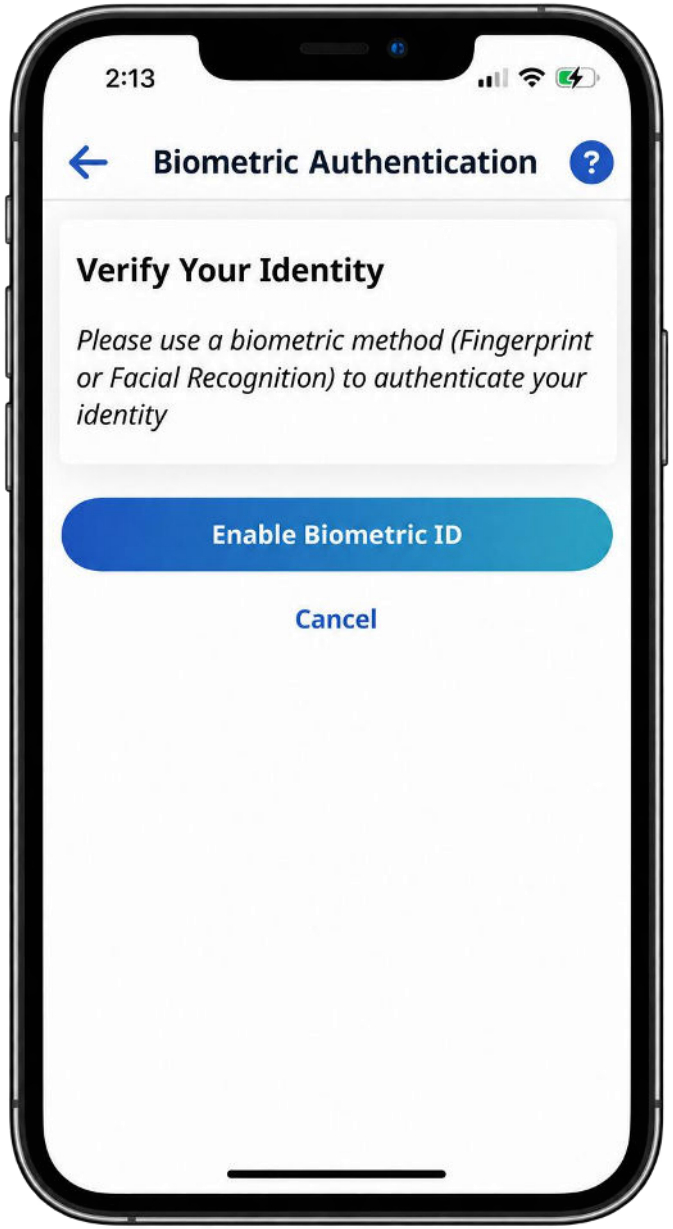
Direct Chat in HHAeXchange+



Enhanced Feature: Biometrics

Biometrics

- Allows caregivers to easily login using Facial recognition or fingerprints.
- Perfect for caregivers that forget their passwords.
- Helps protect agency and patient information from unauthorized access.

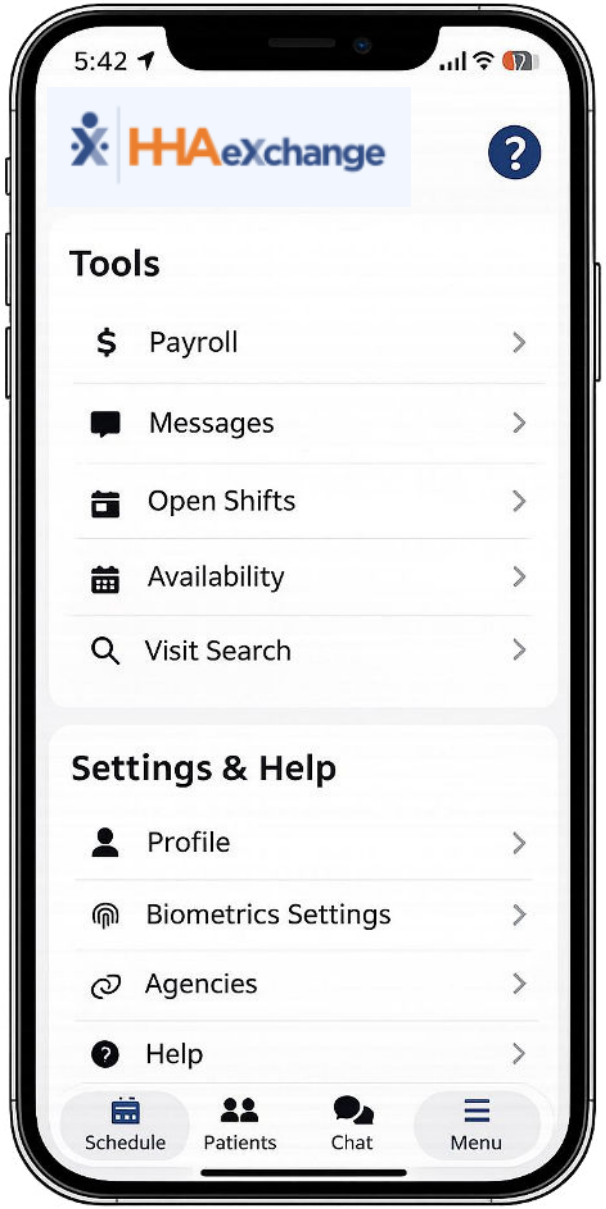


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Enhanced Feature: In App Help

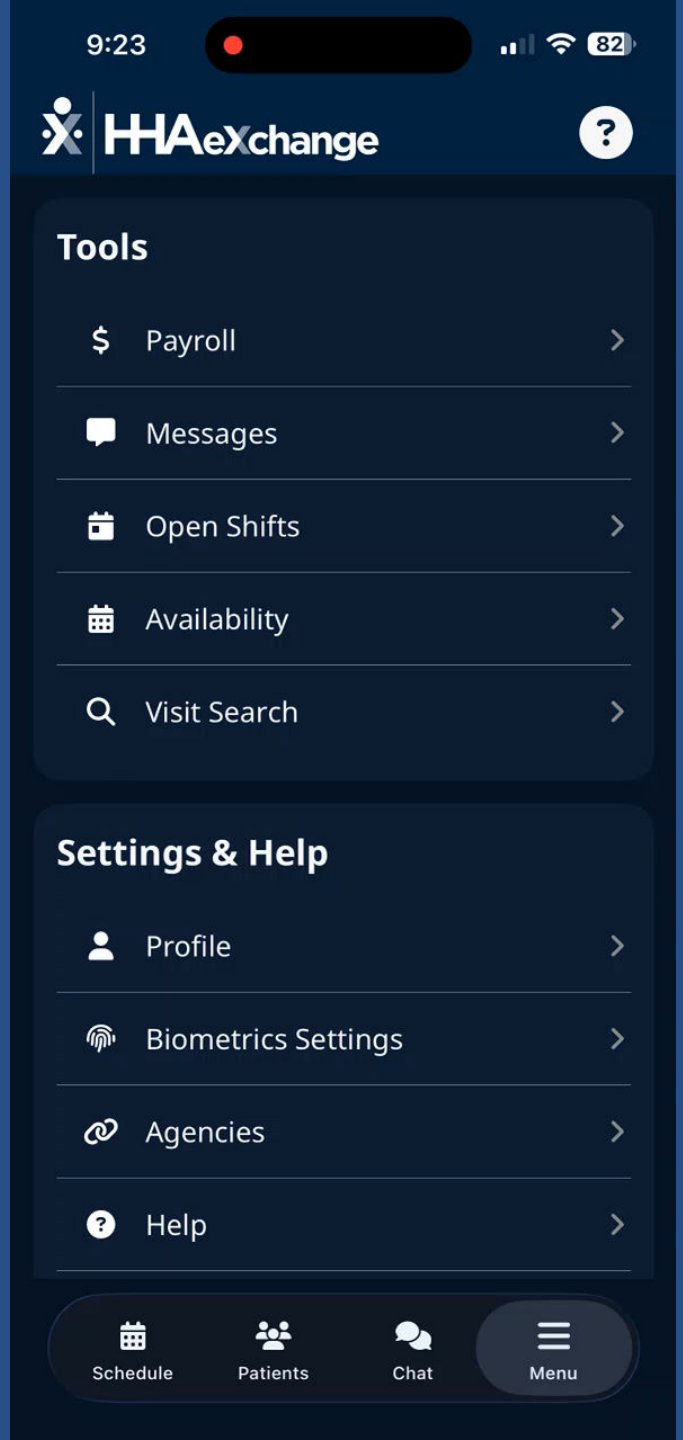
In App Help

- Caregivers can access help and guidance directly in the Mobile+ app.
- A direct link to the Caregiver Knowledge Base makes answers easy to find in the moment.



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In App Help in HHAeXchange+





KEY TAKEAWAYS

KEY TAKEAWAYS

✓ Existing caregivers should wait for the notification to migrate to HHAeXchange+ using the in-app migration prompt.

✓ New caregivers (or those reinstalling the app) use an Activation Code to register.

✓ Scheduling workflows remain the same—the mobile app changes, not how visits are scheduled.

✓ Duties are entered before the completing the clock out.

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RESOURCES

Audience Poll !

What are your next steps?

Help existing caregivers migrate?

Current app

Set up New Caregivers?

New app

Both

Already Started Migration

Current + New app

Neither / Not sure

Need guidance

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Provider Resources: Migration Resources

HHAeXchange+ Customer Guide (Migration Guide)

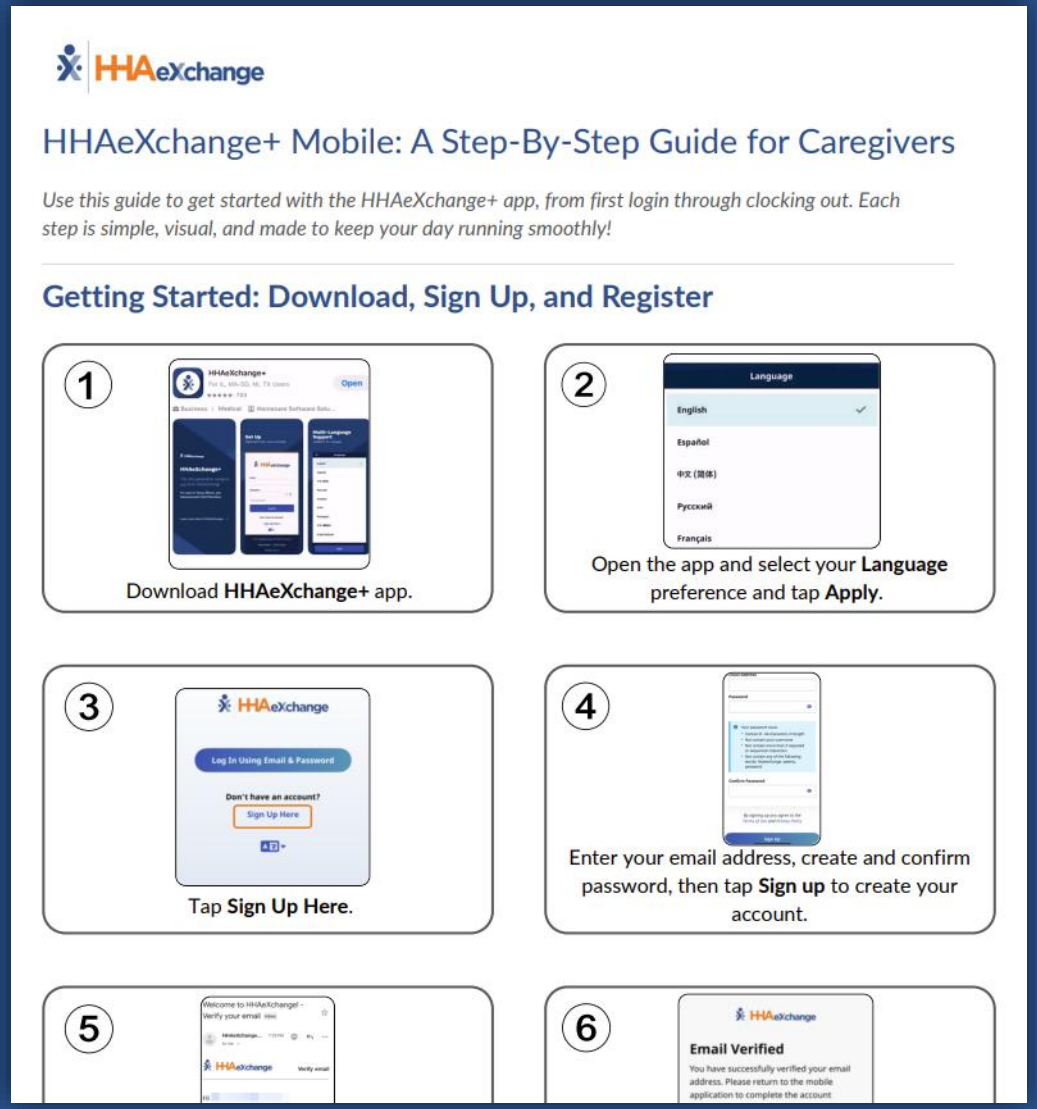
Caregiver Communications Template

Getting Ready for HHAeXchange+ Video

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HHAeXchange+ Mobile App Caregiver User Guide

HHAeXchange+ Caregiver User Guide



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thank you



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