No More EVV Headaches



October 8, 2026

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speakers





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Areas of Expertise: Revenue Cycle

agenda

- EVV Readiness
- EVV Compliance Standards
- Upstream Setup
- Visit Capture Practices
- Visit Maintenance
- Reports
- Key Takeaways
- Resources
- Q/A

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Overview & Who Is This Webinar For?

This session provides a practical overview of EVV readiness in HHAeXchange, including how the state evaluates compliance. It focuses on prevention, consistency, and operational practices that support EVV monitoring readiness.



Who should attend?

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

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Objectives

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



Apply

EVV tools (Mobile App, Offline Mode, and IVR) to ensure accurate & compliant visit capture.



Identify

Investigate & resolve common EVV exceptions using structured Visit Maintenance best practices.



Understand

How EVV data accuracy impacts claim submission & overall compliance performance.



Leverage

EVV compliance reports to proactively monitor risks & support audit readiness.



EVV Readiness

What is Electronic Visit Verification?

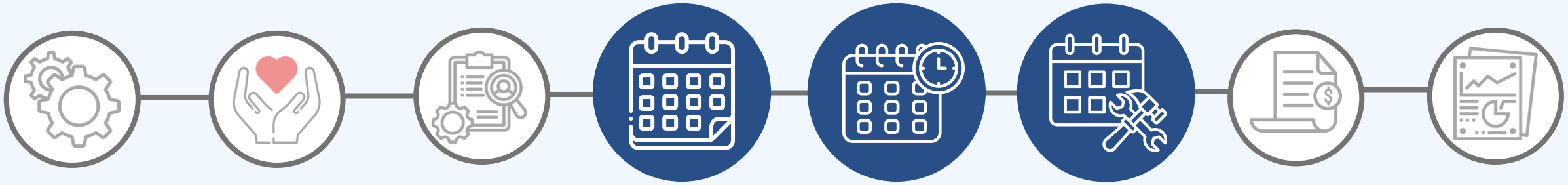
EVV confirms service delivery through electronic clock-in and clock-out capture.



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

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EVV Tracker



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Quick Poll

Raise your hand, if you know

Do you know the Six Critical Data Elements for an EVV Compliant Visit?



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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

Compliance Reminder: Manually modifying visits can affect your EVV compliance score.

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What Makes a Visit Non-Compliant?

🔎 WHAT IT MEANS

A visit is non-compliant when required EVV data is missing, incorrect, or does not align with the scheduled visit.

🚩 HOW IT'S IDENTIFIED

In HHAeXchange, non-compliant visits are flagged as **EVV Exceptions** for review and correction.

⚠ WHY IT MATTERS

- Non-compliant visits can:
- Delay billing
- Trigger additional review
- Require manual corrections
- Increase audit risk

🚨 COMMON EVV EXCEPTIONS:

❌ No EVV captured 📍 Location mismatch ⏰ Missing clock-in/out 🔗 Not linked to schedule ➖ Manual confirmation used

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EVV Compliance Standards

PA DHS EVV Compliance

Providers below 85% or with unresolved aggregation rejections face increased compliance risk.

COMPLIANCE THRESHOLD

85%

DHS compliance monitoring threshold

Activity below this level may be flagged for follow-up.

1. **Monitor**
   Review EVV compliance
2. **Aggregate**
   Confirm visits transmit
3. **Resolve**
   Fix rejections quickly

MCOs mirrors DHS monitoring with additional emphasis on aggregated visits.

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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 prebilling 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

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PA 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.

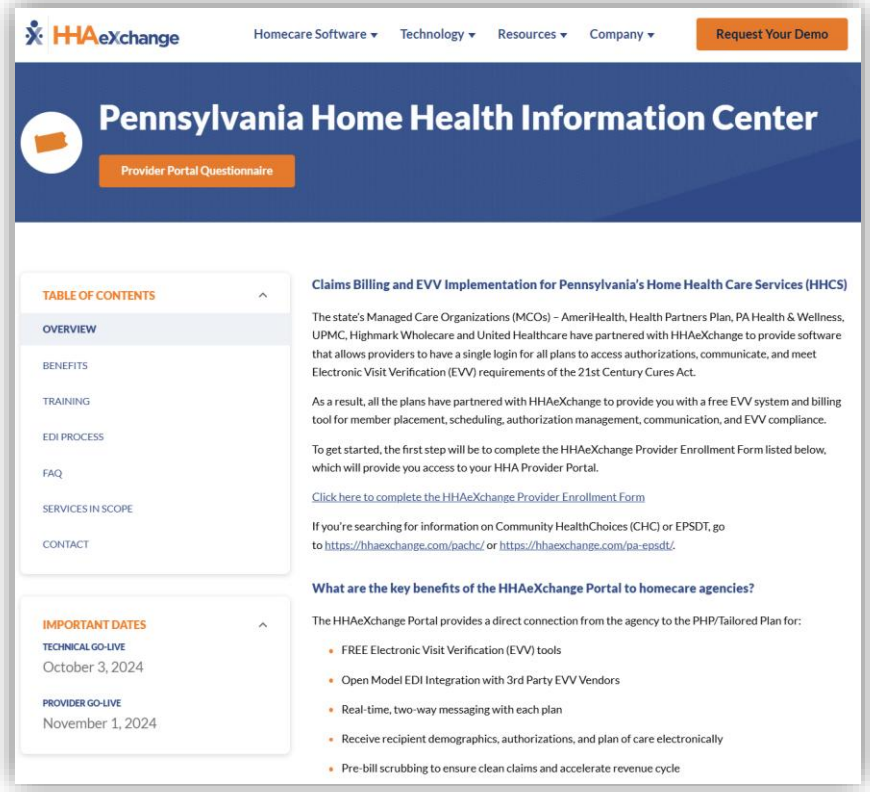
3. **Training & Webinars**

   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.



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

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Upstream Setup

Linked & Internal Payer Setup

Who manages the information — payer or provider?

Linked Payer

Payer-provided information flows into HHAeXchange

What you will see

- Patient placements & authorizations are sent by the payer.
- Service lists are available by payer.
- Rate / Dx code may be payer-managed or provider-managed, depending on payer setup.

Primary ownership **Payer managed**

Internal Payer

Provider-managed setup within HHAeXchange

What your agency manages

- Provider enters the patient, authorization, and service code information.
- Rate / Dx code is provider-managed.
- Use your agency setup and billing requirements as the source of truth.

Primary ownership **Provider managed**

Provider tip: Know the source of truth before you make changes — linked payer data is payer-supplied; internal payer setup is provider-managed.

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Caregiver Setup

Make sure caregivers are EVV-ready before the first visit.

EVV-Ready Caregiver Checklist

1. Ensure the caregiver profile is complete and current
2. Match the discipline to authorized services
3. Link the caregiver to the correct services
4. Test EVV tools before the first visit
5. Use the existing Mobile ID for multi-agency caregivers
6. Do not download the Mobile App more than once

! **Multi-agency caregivers:** use the caregiver's existing Mobile ID. Do not download the app more than once.

Caregiver Resources

Use the QR code to access the caregiver resource.

Caregiver

Review caregiver readiness before visits begin.

Tip: Ask during hiring whether the caregiver works for multiple agencies to help prevent setup issues later.

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Quick Poll

Raise your hand, if you know

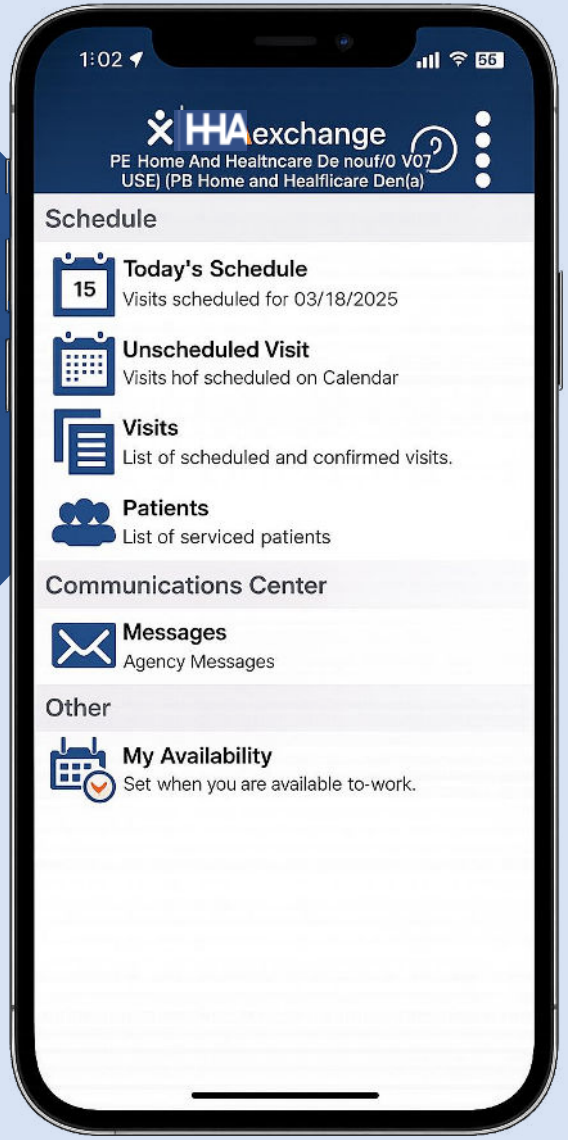
How many of you have attended one of our previous HHAeXchange+ Caregiver Mobile App Webinars?

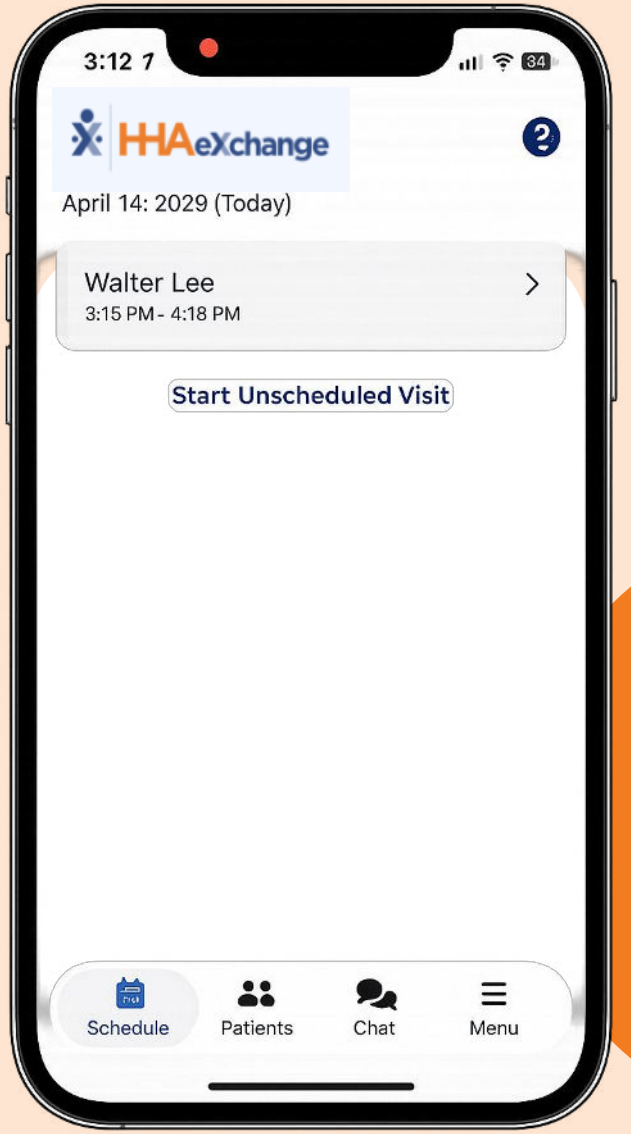


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New HHAeXchange+ Experience

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+

1 Agency sends the code

Open the caregiver profile, select Enable Access, and generate the Mobile Activation Code.

2 Caregiver receives the code

The caregiver receives the code and uses it to begin registration for HHAeXchange+.

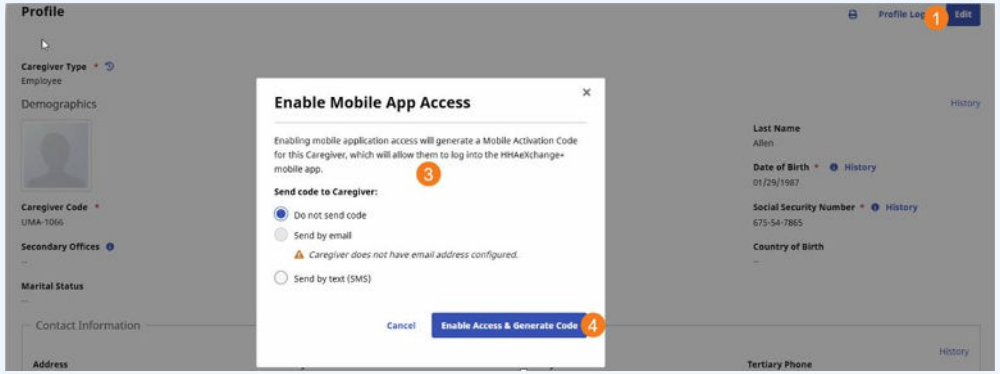
3 Download, register & activate

Download HHAeXchange+, complete registration, enter the activation code, and finish setup to start using the app.

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.

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Managing Mobile App Users

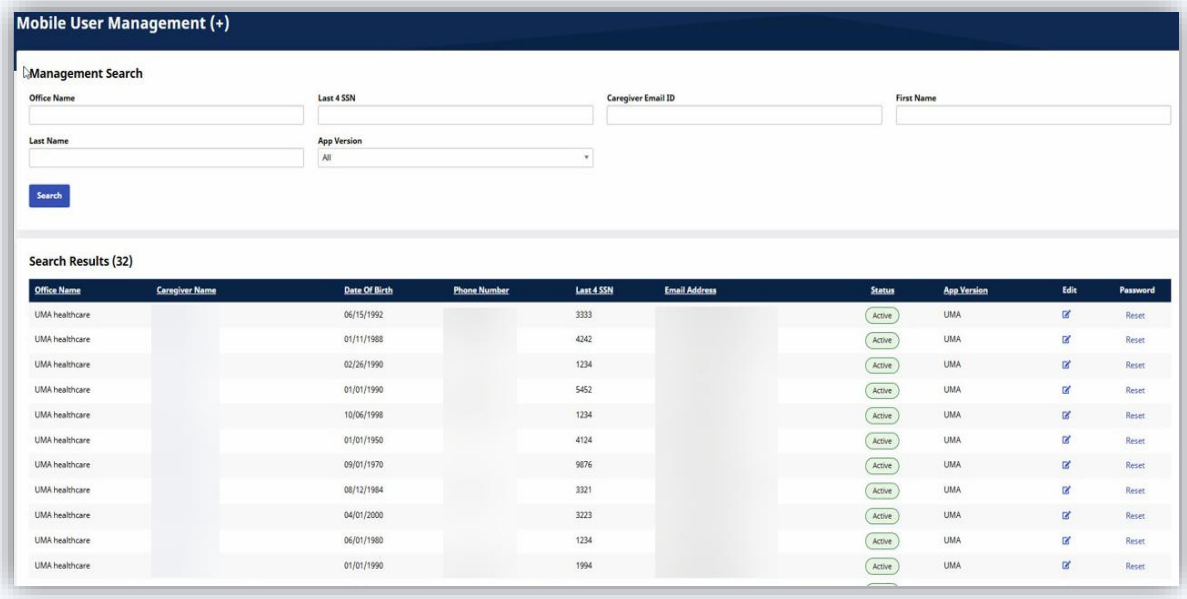
Admin > Mobile User Management

Mobile User Management (+)

A centralized place to manage service providers using HHAeXchange+.

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

Mobile User Management (+)



Use Mobile User Management (+) to search, review, and manage caregiver app access.

Tip: Keep caregiver mobile access current using Mobile User Management.

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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

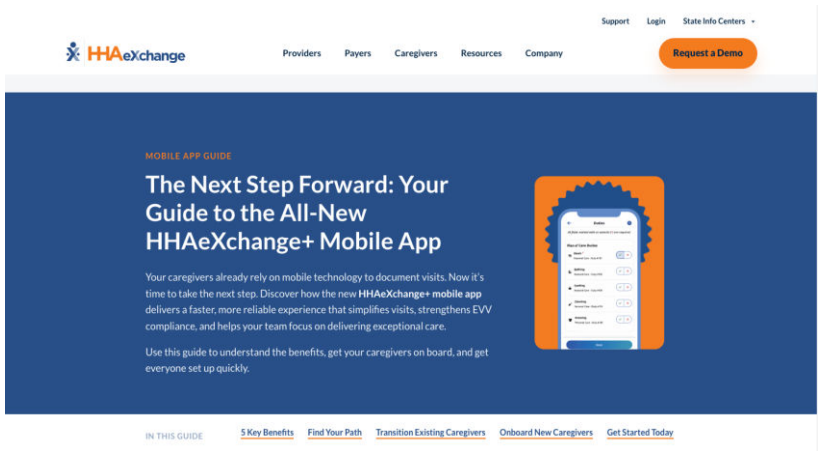
Supporting existing caregivers? Use the transition resources. Onboarding new caregivers? Use the new-caregiver setup guidance.

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

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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

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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.

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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.

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Quick Poll

Let’s see what applies to your agency

How many of you have overnight shifts?



Raise your hand.

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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.

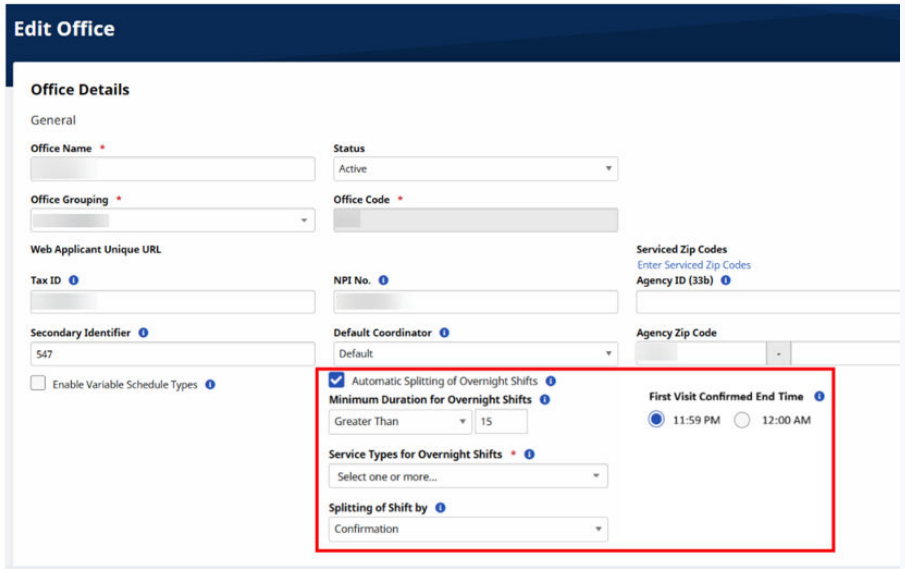
02 Configure — Set duration, end-time, and service rules.

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



Automatic Splitting of Overnight Shifts

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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.

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Q&A

Ask questions before we continue

We'll take 1-2 questions related to the topics covered in this session.

Need more help?
Use the resources and support channels shared.

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Visit Capture Practices

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.

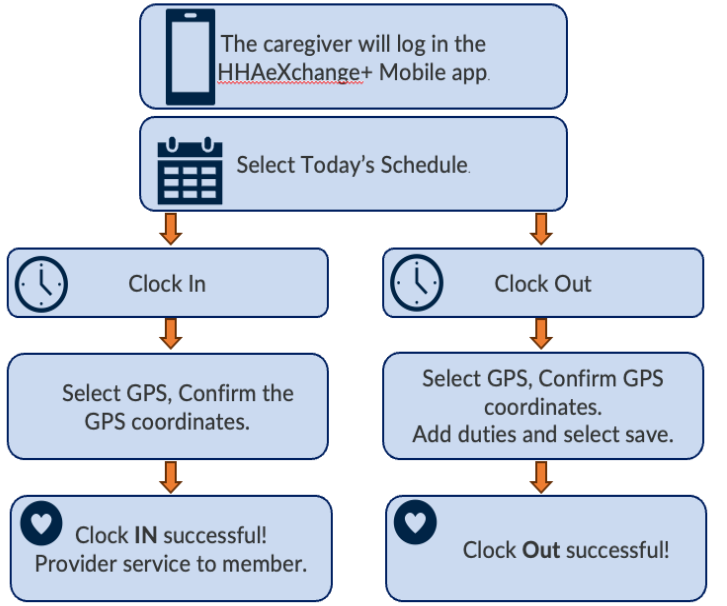
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Visit Capture Process by Method

Mobile App

Preferred EVV method

Mobile App Overview



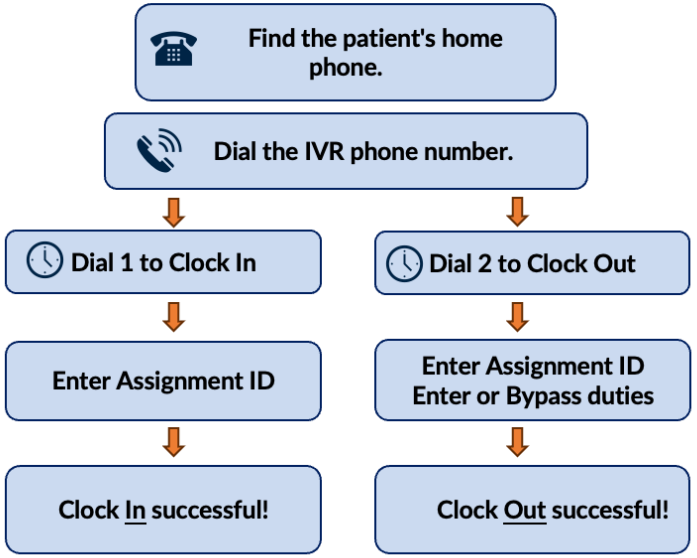
Best when caregivers are using the HHAX+ Mobile App at the patient location.

IVR

Alternative method

IVR Capture Overview

Interactive Voice Response Number English & Spanish



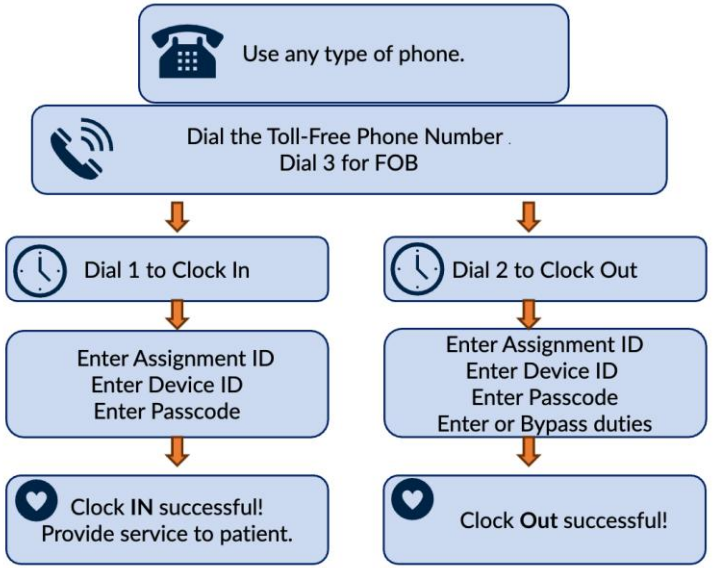
Use only when IVR is the approved method and the patient landline is available.

FOB

Alternative method

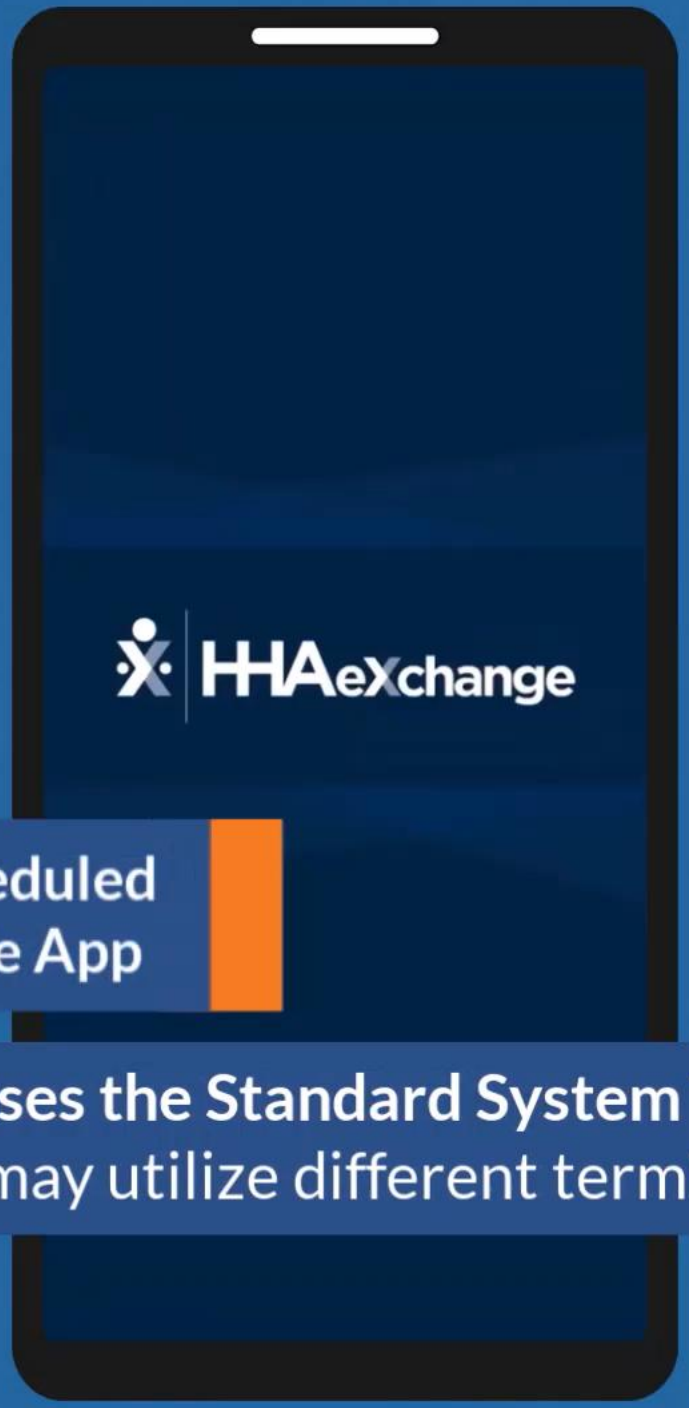
FOB Capture Overview

Alternate Device



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

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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

Quick Poll

Raise your hand, if you know

How many of you know about Offline Mode?



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Offline Mode

Offline Mode keeps EVV capture moving without connectivity and syncs activity when the device reconnects.

What Offline Mode does: Caregivers can clock in and clock out for EVV even when internet or cell service is unavailable.

1 Prepare & Capture

- Log in with your Offline PIN.
- Access available schedules and patient information on the device.
- Continue capturing EVV for scheduled and unscheduled visits while offline.

2 Reconnect & Sync

- Reconnect to internet or cell service when available.
- Offline EVV activity automatically syncs with HHAeXchange.
- Review the visit if any follow-up is needed.

RESOURCE

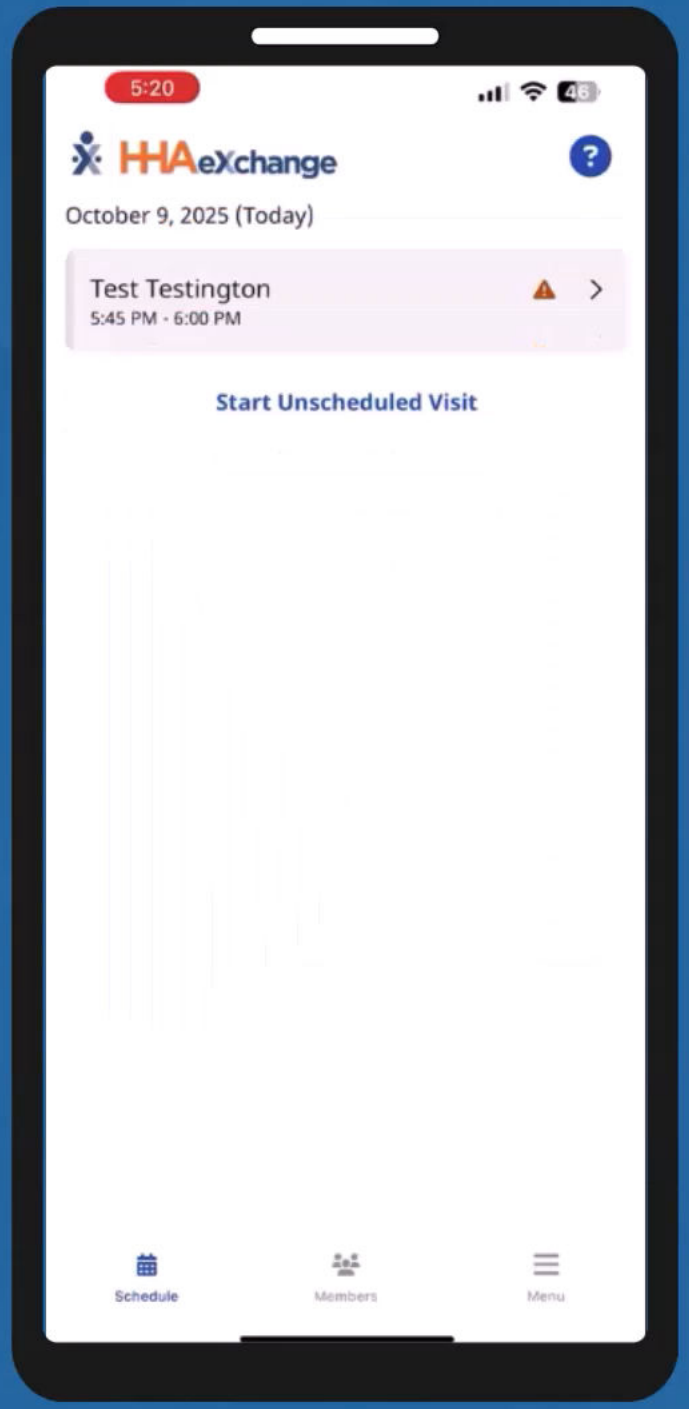
HHAeXchange+ Caregiver User Guide

Provider readiness check

Before the first visit, make sure the caregiver has set up an Offline PIN and is ready to use Offline Mode when connectivity is unavailable.

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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

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Visit Maintenance

Quick Poll

Raise your hand for the option that best describes your agency.

How many of you are still using the Call Dashboard?



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Visit Verification & Maintenance Overview

From captured visit to a billing-ready record

What is Visit Maintenance?

A central workspace for visit activity. Review visit status, EVV linkage, and exceptions in one place so your agency can identify and resolve issues faster.

How is it used?

- Review completed visits
- Resolve EVV and prebilling exceptions
- Link EVV records to visits
- Review visit details and authorizations

Where it fits in the workflow

1

Capture the Visit



Caregiver records the visit using an approved EVV method.

2

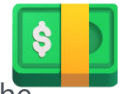
Verify & Maintain



Review the visit, resolve exceptions, and confirm details.

3

Prepare for Billing



Move clean, verified visits into the billing workflow.

Provider tip: Use Visit Maintenance as the checkpoint between EVV capture and billing. Resolve exceptions before they create downstream rework.

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Visit Maintenance: Linking EVV

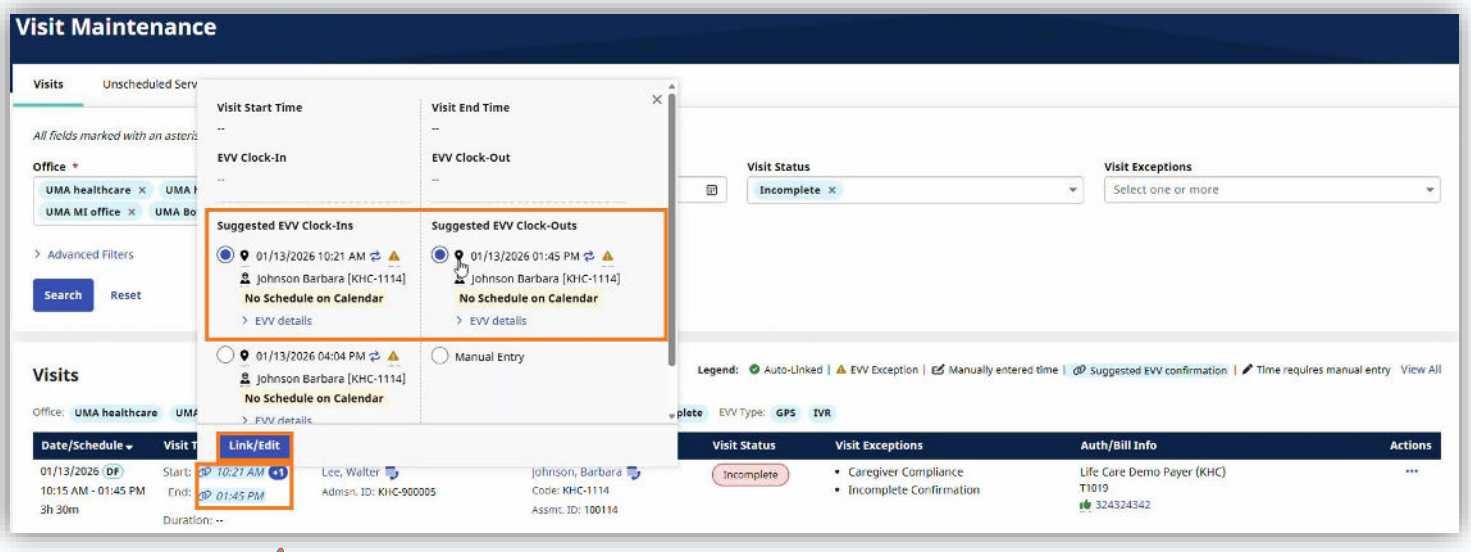
Review suggested EVV confirmations and link the correct EVV record to the visit.

How to link EVV

1. **Find the visit**
   Open Visit Maintenance and locate the visit that needs EVV confirmation.
2. **Review the suggested EVV**
   Hover over the suggested clock-in/clock-out details and confirm they match the visit.
3. **Link or reject the EVV**
   Select Link/Edit, then choose the suggested EVV record or reject it and use the appropriate alternative.
4. **Save**
   Save the visit after the EVV times are linked or otherwise resolved.

In HHAeXchange

Suggested EVV times are shown for review before you link them to the visit.



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

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Visit Maintenance Scenarios

Four common situations to review when an EVV record does not align to a scheduled visit.

Visit Maintenance → Review EVV record → Resolve the alignment issue

1 No Schedule Opening

The EVV record exists, but there are multiple exceptions associated with the record.

2 No Schedule on Calendar

There is not an exact match of EVV record to associated with scheduled on the calendar.

3 GPS Out Of Range

The GPS location does not match the patient's recorded address

4 Duplicate Call (IVR)

Multiple EVV calls for the same schedule.

Key takeaway: **Use Visit Maintenance to review the EVV record, understand the gap, and resolve it before billing.**

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Visit Maintenance: No Schedule Opening

When an EVV record does not match a schedule, review the record before deciding whether it needs investigation or rejection.

What you may see

- More than one schedule or record appears when you open the visit.
- Patient, caregiver, or call information may be inaccurate and require investigation.
- Examples include GPS out-of-range or other EVV-related issues.

Provider takeaway: A "No Schedule Opening" does not automatically mean the visit is wrong—review the record first, then resolve or reject based on what you find.

What to do next

1. **Investigate the record**

   Open the visit details and compare the patient, caregiver, call, GPS, and schedule information.

2. **Reject only when it is a duplicate**

   If multiple calls occurred at the same time and one is already linked, another "No Schedule Opening" record may simply be the duplicate.

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Visit Maintenance: No Schedule on Calendar

What it means — and what to review next

"No Schedule on Calendar" means HHAeXchange has an EVV call, but there is no matching scheduled visit on the calendar.

1 No scheduled visit

There is simply no schedule associated with the visit.

2 Outside the tolerance range

The caregiver clocked in/out outside the scheduled time tolerance which led to no matching schedule.

Example: scheduled 8–9 AM, but the caregiver calls 3 hours later.

What to do next

1. Review the EVV call and patient/caregiver details.
2. If appropriate, use Link/Edit → New Schedule to create the missing schedule.
3. If the EVV is incorrect or duplicated, reject the call.

Provider tip: Check whether the call is a true missing schedule, outside the tolerance range, or part of an unscheduled workflow before creating a new schedule.

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Visit Maintenance: GPS Out of Range

SCENARIO: A caregiver clocks in and out using the Mobile App, but the GPS location is outside the acceptable range of the patient's recorded address.

1 REVIEW THE EXCEPTION

Go to Visit > Visit Maintenance > Visits and filter for "GPS Signal Out of Range."

2 CONFIRM WHAT HAPPENED

Open the EVV details and compare the captured GPS coordinates with the patient's recorded service address.

3 RESOLVE THE VISIT

If care occurred at the correct location, update the coordinates. If the location was incorrect, reject the EVV.

Choose the resolution based on the actual service location

IF THE CAREGIVER WAS AT THE CORRECT LOCATION

Review the coordinates and select "Map Coordinates to Address" to update the visit location information.

IF THE CAREGIVER WAS NOT AT THE CORRECT LOCATION

Select "Reject EVV" when the visit location is incorrect according to your review and agency process.

Provider tip: Make sure the patient address is accurate and reinforce that caregivers should clock in and out at the patient's actual location.

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Visit Maintenance: Duplicate Calls

Review EVV calls and keep the correct call when multiple calls are captured for the same visit.

Scenario:

A caregiver may make multiple calls for the same visit, especially when using the IVR method.
Providers should review the calls, keep the valid call, and reject the duplicates.

Prevention Tip:

Always review visit start and end times before linking calls to help prevent duplicates.

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Visit Maintenance

One place to review, resolve, and manage visit-related issues

Path: Visit > Visit Maintenance

Use Visit Maintenance as your central workspace after EVV is captured—to review status, correct exceptions, link EVV, and confirm authorization details.

Check Visit Status

Review the current status of a visit and identify items that need attention.

Resolve Exceptions

Fix EVV and prebilling exceptions so visits can move forward.

Link EVV to Visits

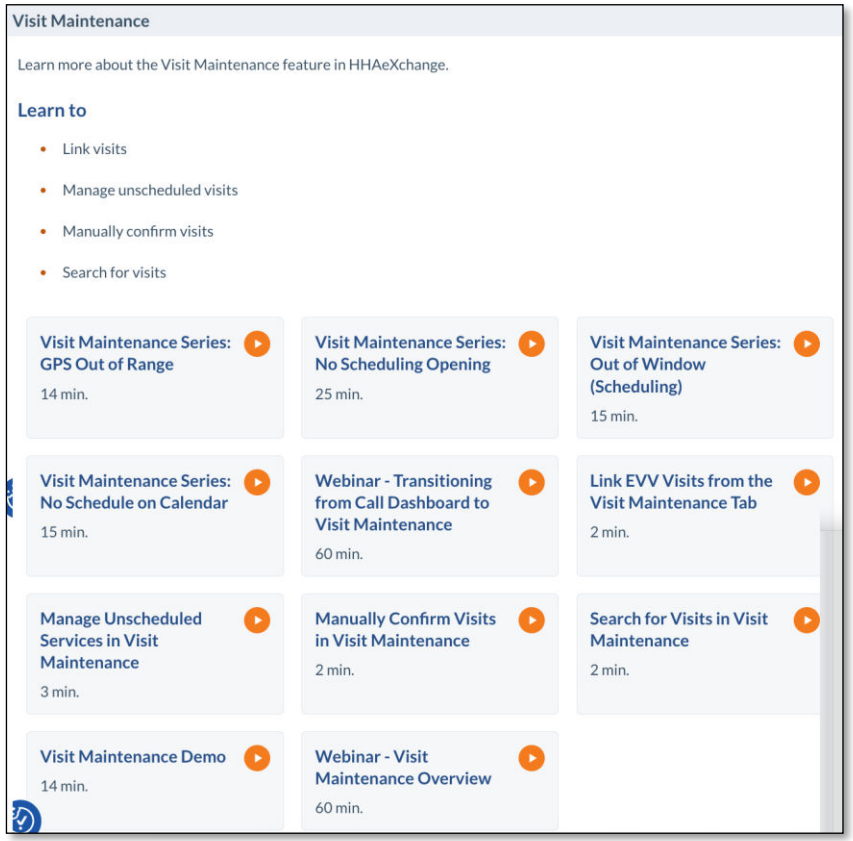
Quickly link the correct EVV record to the associated visit.

Review Authorization

View authorization status and visit-related authorization details.

Visit Maintenance Scenarios

Scan to review Visit Maintenance



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Reports

State Aggregation Report

Daily review confirms which EVV records reached the PA aggregator, and which failures must be resolved before billing

PURPOSE

Your daily EVV receipt

Shows whether confirmed EVV data was accepted, still processing, or failed.

Only bill after a Success response.

RECORD STATUS

Success

Accepted by the aggregator

Ready to move forward with billing workflow

Pending

Still processing

Monitor until it updates to Success or Failed

Failed

Action required

Use the error message as your fix-it list

DAILY REVIEW

1. **Run all 3 sections**
2. **Filter to Failed first**
3. **Read Error Message**
4. **Fix or contact Support**

Best practice: assign one staff owner for this daily check.

RUN ALL THREE REPORT SECTIONS

A visit may fail because of caregiver, patient, or visit data: review each section before billing.

Caregiver | **Patient** | **Visits**

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State Aggregation Report

Navigate to **Report > Exception Report> State Aggregation Report**

NPI Number	Visit Date	Caregiver Nam	Patient Name	Procedure Cod	Visit Start Tim	Visit End Time	Call Assignmer	Call Type	Record Status	Last Export Da	Error Messag
1234567890	07/16/2025	Caregiver, Caregiver	Patient, Patient	S5125	07/16/2025 1000	07/16/2025 1500	Time Out	Telephony	Success	07/17/2025	
1234567890	07/17/2025	Caregiver, Caregiver	Patient, Patient	S5125	07/17/2025 1000	07/17/2025 1500	Time In	Telephony	Failed	07/23/2025	Worker not found
1234567890	07/17/2025	Caregiver, Caregiver	Patient, Patient	S5125	07/17/2025 1000	07/17/2025 1500	Time Out	Telephony	Failed	07/23/2025	Worker not found
1234567890	07/18/2025	Caregiver, Caregiver	Patient, Patient	S5125	07/18/2025 1000	07/18/2025 1500	Time In	Telephony	Failed	07/23/2025	Worker not found
1234567890	07/18/2025	Caregiver, Caregiver	Patient, Patient	S5125	07/18/2025 1000	07/18/2025 1500	Time Out	Telephony	Failed	07/23/2025	Worker not found
1234567890	07/21/2025	Caregiver, Caregiver	Patient, Patient	S5125	07/21/2025 1000	07/21/2025 1502	Time In	Telephony	Failed	07/23/2025	Worker not found
1234567890	07/21/2025	Caregiver, Caregiver	Patient, Patient	S5125	07/21/2025 1000	07/21/2025 1502	Time Out	Telephony	Failed	07/23/2025	Worker not found
1234567890	07/22/2025	Caregiver, Caregiver	Patient, Patient	S5125	07/22/2025 1001	07/22/2025 1500	Time In	Telephony	Failed	07/23/2025	Worker not found
1234567890	07/22/2025	Caregiver, Caregiver	Patient, Patient	S5125	07/22/2025 1001	07/22/2025 1500	Time Out	Telephony	Failed	07/23/2025	Worker not found
1234567890	07/01/2025	Caregiver, Caregiver	Patient, Patient	S5125	07/01/2025 0824	07/01/2025 1601	Time In	Mobile	Success	07/02/2025	
1234567890	07/01/2025	Caregiver, Caregiver	Patient, Patient	S5125	07/01/2025 0824	07/01/2025 1601	Time Out	Mobile	Success	07/02/2025	
1234567890	07/02/2025	Caregiver, Caregiver	Patient, Patient	S5125	07/02/2025 0806	07/02/2025 1601	Time In	Mobile	Success	07/03/2025	
1234567890	07/02/2025	Caregiver, Caregiver	Patient, Patient	S5125	07/02/2025 0806	07/02/2025 1601	Time Out	Mobile	Success	07/03/2025	
1234567890	07/03/2025	Caregiver, Caregiver	Patient, Patient	S5125	07/03/2025 0800	07/03/2025 1601	Time In	Mobile	Success	07/04/2025	

Resource: PA MCO EVV Common Aggregation Failed Responses

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EVV Compliance Summary Report

Use this weekly to identify which contracts or payers need attention before compliance issues impact billing.

PURPOSE

High-level EVV health check

Shows EVV compliance by contract for the selected time period, helping teams spot payer or contract-level risk early.

% Compliance

Visits without EVV exceptions

% Exceptions

Visits with EVV exceptions

Recommended cadence: Weekly

WHAT TO REVIEW

1. ### Contracts below target

   Prioritize contracts or payers with lower compliance percentages.

2. ### Exception percentage

   Use % Exceptions as the non-compliance indicator for follow-up.

3. ### Confirmed vs. compliant visits

   Compare confirmed visits to compliant visits to size the issue.

4. ### Missed and billed visits

   Check whether missed visits or billed visits are driving patterns.

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EVV Compliance Summary Report

Navigate to **Report > EVV Compliance Reports > EVV Compliance Summary Report**

	A	B	C	D	E	F	G	H	I	J
1		**MCO**	**Total Visits**	**Total EVV Compliant Visits**	**Confirmed Visits**	**Billed Visits**	**Missed Visits**	**Visits with Exceptions**	**% Exceptions**	**EVV Compliance Percentage**
2	1	AmeriHealth Caritas of PA (ABC)	2,241	1,809	2,118	2,099	6	309	14.59%	85.41%
3	2	Centene PA Health Wellness (ABC)	1,584	1,332	1,539	1,517	0	207	13.45%	86.55%
4	3	KEYSTONE FIRST CHC (ABC)	3,498	2,746	3,229	3,189	0	483	14.96%	85.04%
5	4	Private Pay	55	43	54	0	0	11	20.37%	79.63%
6	5	Promise - ACT 150	40	37	40	0	0	3	7.50%	92.50%
7	6	PROMISE - ODP	541	484	524	0	1	40	7.63%	92.37%
8	7	UPMC LTSS (ABC)	3,683	2,904	3,377	3,326	0	473	14.01%	85.99%
9		**Total:**	**11,642**	**9,355**	**10,881**	**10,131**	**7**	**1,526**	**14.02%**	**85.98%**
10										

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EVV Compliance by Caregiver Report

Use this weekly to identify caregivers who may need coaching, follow-up, or additional EVV support.

PURPOSE

Caregiver-level visibility

Shows compliance percentages and exception counts by caregiver, making it easier to spot repeat EVV capture issues.

% Compliance

Red flag for coaching

Counts

How many visits are impacted

Recommended cadence: Weekly

WHAT TO REVIEW

1. ### High exception rates

   Start with caregivers who have the highest % Exceptions.

2. ### Exception volume

   Validate whether the issue is isolated or affecting many visits.

3. ### Repeat patterns

   Look for missed clock-ins, missed clock-outs, or manual adjustments.

4. ### Progress over time

   Rerun weekly to see if coaching is improving EVV adoption.

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EVV Compliance by Caregiver Report

Navigate to **Report > EVV Compliance by Caregiver Report**

HHAeXchange

EVV Compliance By Caregiver (New)

Report Date: 01/06/2025 10:21

Office(s):	**From Date:** 12/28/2024	**To Date:** 1/3/2025
Caregiver: All	**Type of Service:** Non-Skilled	**Coordinator:** All
Discipline(s): All	**Service Code(s):** All	**Contract(s):** All
Caregiver Location(s): All	**Caregiver Team(s):** All	**Caregiver Branch(es):** All
Include Type: All		

Sr.#	Contract	Caregiver Code	Caregiver Name	Total Visits	Confirmed Visits	Total EVV Compliant Visits	Billed Visits	Missed Visits	Visit with Exceptions	% Exceptions	EVV Compliance Percentage
1				7	7	5	2	0	2	28.57%	71.43%
2				7	5	0	2	0	5	100.00%	0.00%
3				7	7	4	2	0	3	42.86%	57.14%
4				7	7	7	2	0	0	0.00%	100.00%
5				5	4	4	0	0	0	0.00%	100.00%
6				7	7	7	2	0	0	0.00%	100.00%
7				7	7	5	2	0	2	28.57%	71.43%
8				7	7	6	2	0	1	14.29%	85.71%
9				7	4	4	2	3	0	0.00%	100.00%
10				5	5	5	2	0	0	0.00%	100.00%

Other EVV Compliance Reports

Monitor compliance, investigate exceptions, and identify trends

Navigate to **Report > EVV Compliance Reports**

01 EVV Compliance Daily Summary Report

What it shows

Daily compliance percentage by contract

Use it to

quick daily monitoring

02 EVV Compliance Detail Report

What it shows

Compliance exceptions and reasons by day and patient

Use it to

investigating exceptions

03 EVV Compliance Exception Reason Usage Report

What it shows

Exception reasons and corresponding percentages by contract

Use it to

spotting recurring trends

Use these reports as part of your **ongoing EVV review—start with the daily view, drill into patient-level exceptions, and use reason trends to focus follow-up based on the level of detail you need.**

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KEY TAKEAWAYS

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Key Takeaways

Keep EVV accurate from capture through maintenance

01

Capture EVV correctly

Use the approved EVV method and capture the visit accurately at the time care is provided.

02

Prevent avoidable exceptions

Accurate caregiver, patient, schedule, and visit information helps prevent issues later.

03

Use Visit Maintenance

Review exceptions, resolve issues, and link existing EVV records instead of recreating visits when appropriate.

04

Monitor before billing

Use the Visit Report and EVV Compliance by Caregiver to identify trends and stay ready for billing.



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RESOURCES

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HHAeXchange University

Foundational training for your HHAeXchange journey

Build the foundation

HHAeXchange University gives providers a self-paced introduction to the core workflows they will use in the platform.

Patient & Caregiver Management

Understand the core setup and management workflows.

Agency Setup

Learn the foundational configuration needed to get started.

Scheduling & EVV

Build familiarity with scheduling and visit workflows.

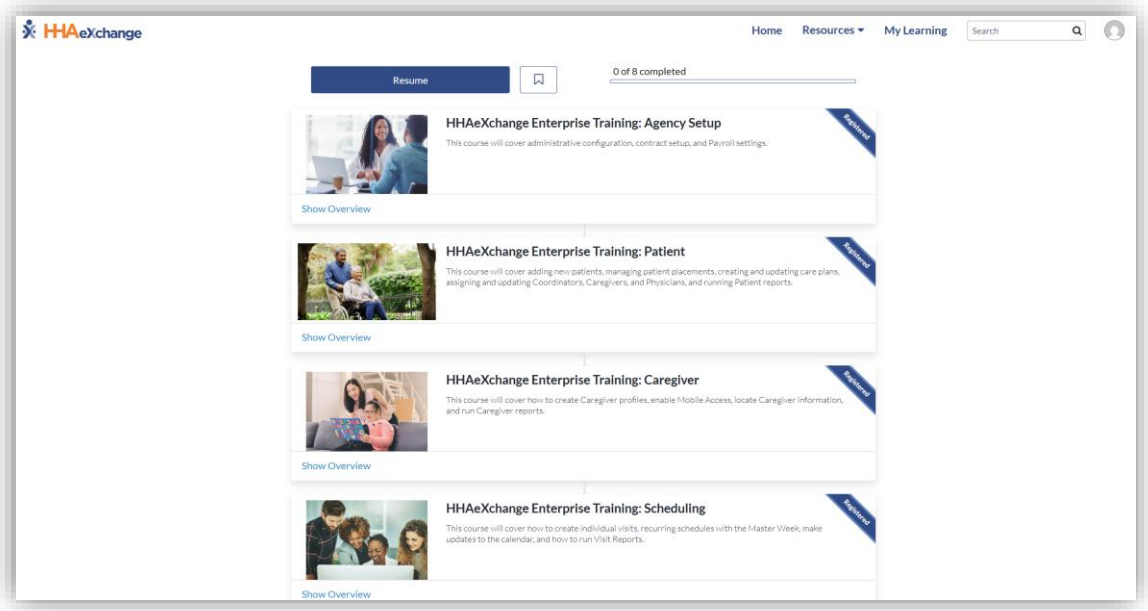
Visit Maintenance & Billing

Connect visit review and maintenance to billing readiness.

Self-paced learning • Revisit courses anytime • Share with new users

Onboarding Program

Explore courses at your own pace



Scan to access HHAeXchange University

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Client Support Portal

A direct path to help when you need it

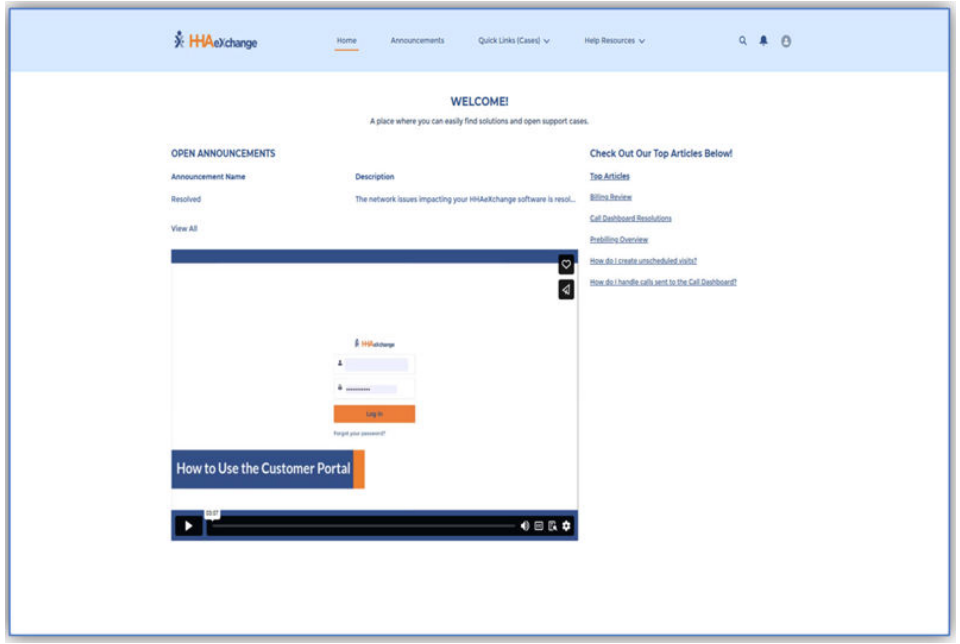
When you need support

Use the Client Support Portal to submit and manage support requests for HHAeXchange.

1. **Open the Client Support Portal**
2. Log in and select the appropriate case option
3. Submit your request and follow its status

Best for onboarding, EVV, billing, technical support, and system questions.

Request help and find support resources in one place.



Scan to access
Client Support Portal

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Provider Resources: Knowledge Bases

Use the resource that matches your role or EVV setup.

Provider Knowledge Base

For provider portal questions and workflows

- Scheduling & EVV workflows
- Billing and claims guidance
- Step-by-step help articles
- Provider-specific FAQs



Scan to open

Open Knowledge Base

Caregiver Knowledge Base

For caregiver app and EVV support

- HHAeXchange+ Mobile App
- Registration & login help
- EVV visit capture guidance
- Caregiver FAQs



Scan to open

Open Knowledge Base

Third-Party EVV (EDI) Knowledge Base

For Alt EVV / EDI integration support

- EDI onboarding resources
- Third-party EVV guidance
- Technical documentation
- Submission & troubleshooting help



Scan to open

Open Knowledge Base

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PA Provider State 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.

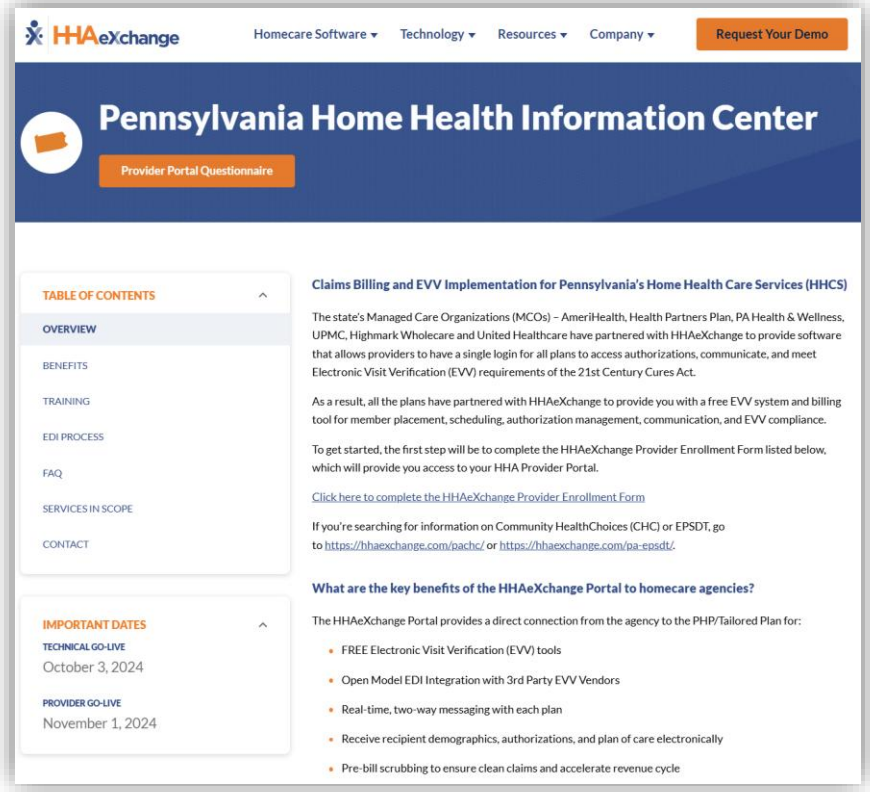
3. **Training & Webinars**

   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.



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

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Mark Your Calendar!

Stay connected with upcoming HHAeXchange training opportunities

1 Register for Live Training

Join upcoming webinars and office hours tailored to your agency.

2 Choose the Topic You Need

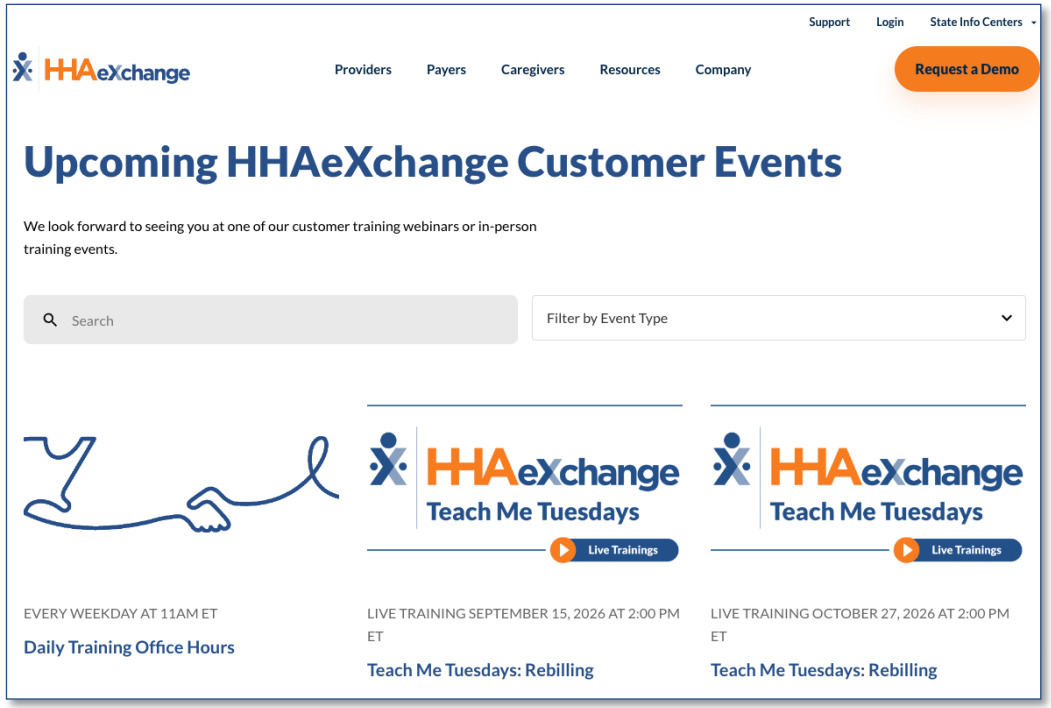
Find sessions on EVV, mobile app, scheduling, billing, reporting, and more.

3 Keep Learning

Get practical tips, answers, and guidance you can apply to your workflows.

Scan the QR code or visit the Customer Training Events page

Upcoming HHAeXchange Customer Events



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thank you

Please provide us your feedback



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