HHAeXchange+ Mobile App Caregiver Guide EVV

Contents

HHAeXchange+ Mobile App Caregiver Guide

Overview

The **HHAeXchange+ Mobile App** is used to Clock In and Clock Out for services requiring Electronic Visit Verification (EVV), review Patient and Visit information, manage Availability, and perform other administrative tasks. The Mobile App is available for both iPhone and Android users. This documentation covers Mobile App functions and setup performed on the Caregiver's device.

Please direct any questions regarding the content of this document to HHAeXchange Client Support. Refer to **Help** in the Mobile App for immediate questions or tap the link to contact support for further assistance.

Some Mobile App features are activated by System Administration. Please contact HHAX Support Team for details, setup, and guidance.

Mobile App Data Retention

Caregivers have access to the following number of days of historical data on the Mobile App:
- Patient List - Includes Patients serviced during the past 30 days plus other Patients assigned to the Caregiver by the Agency/Employer.
- Patient Search - Up to 365 days (starting with 90 days at migration to the HHAeXchange+ Mobile App).

Accessibility

The HHAeXchange+ Mobile App adheres to W3C's Web Content Accessibility Guidelines (WCAG). The Mobile App screens include color contrasts, button color changes, and icons or markings to achieve this.

HHAX System Key Terms and Definitions

Refer to the HHAX Terms and Definitions Table for the basic terms used throughout the application and documentation.

Refer to the HHAX Terms and Definitions Table (Texas) for the specific Texas terms and how they are used throughout the application and documentation.

HHAX System Key Terms and Definitions

The following provides basic definition of HHAX System key terms applicable throughout the document.

Key term can be configured in the HHAX system.

Term	Definition
Patient	Refers to the Member, Consumer, or Recipient. The **Patient** is the person receiving services.
Caregiver	Refers to the Aide, Homecare Aide, Homecare Worker, or Worker. The **Caregiver** is the person providing services.
Provider	Refers to the Agency or organization coordinating services.
Payer	Refers to the Managed Care Organization (MCO), Contract, or Health and Human Services (HHS). The **Payer** is the organization that manages patient Medicaid benefits and claims payments.
HHAX	Abbreviation for HHAeXchange.
UPR	Acronym for Universal Patient Record (Linked Contract Patient)

HHAX Texas Terms and Definitions

The following table lists terms used in the HHAeXchange system and cross references them to terms and definitions used in EVV policy in Texas.

Terms marked with an asterisk can be configured in the HHAX system.

HHAX Term	Texas Term	Definition
Billable Hours (Adjusted Hours)	Bill Hours	The EVV system calculates Bill Hours by subtracting the Bill Time In from Bill Time Out and rounding to the nearest quarter hour increment. Bill Hours represents the hours to be billed.
*Caregiver	Service Provider or Consumer Directed Services (CDS) Employee	Service Provider: Person who provides an EVV service to a Member and is employed by or contracted with a Program Provider. CDS Employee: Person who provides an EVV service to a Member and is employed by a CDS Employer.
Confirmed Visit	EVV Visit Transaction	Record generated by an EVV system that contains data elements for an EVV visit. Data elements include service authorization data, member data, service provider data, program provider or FMSA data, and EVV service delivery data.
--	Consumer Directed Services (CDS) Employer	Member or legally authorized representative (LAR) who chooses to participate in the CDS option and is responsible for hiring and retaining a service provider to deliver a Medicaid service.
Duty	Task	Activities of Daily Living that can be recorded as having been performed or refused during a visit.
EVV Call In	EVV Clock In	Time captured by the EVV system from the electronic verification method (home phone landline, alternative methods/devices, mobile method) that the service provider used to indicate the beginning of a service delivery visit.
EVV Call Out	EVV Clock Out	Time captured by the EVV system from the electronic verification method (home phone landline, alternative methods/devices, mobile method) that the service provider used to indicate the end of a service delivery visit.

| HHAX Term	Texas Term	Definition
Fixed Object (FOB)	Alternative Device	An HHSC-approved electronic device that allows the service provider or CDS employee to clock in and clock out of the EVV system from the member's home.
HHAX	HHAeXchange	Acronym for HHAeXchange.
Manual Visit Confirmation	Manually Entered Visit	A visit transaction manually entered into the EVV system when the service provider or CDS employee fails to clock in or out of the EVV system or an HHSC-approved clock in or clock out method is not available.
Mobile Verification	Mobile Method	Clocking in and out of the EVV system in the home or community using an HHAX-provided application on a smart phone or other mobile device with Internet connectivity.
Office	Business Unit/Branch	A separate branch office, under the same or a different National Provider Identifier (NPI), associated with the same Provider Agency.
Passcode	Alternative Device Code or Token number	Code generated by the FOB and entered by the service provider or CDS employee to validate the visit.
*Patient	Member	Person eligible to receive Medicaid services requiring the use of EVV.
Plan Code	Payer Plan Code	Code to identify a specific payer (HHSC or managed care organization)
*Provider/ Agency	Program Provider or Financial Management Services Agency (FMSA)	Program provider: Entity that contracts with HHSC or a managed care organization (MCO) to provide an EVV service. FMSA: Entity that contracts with HHSC or an MCO to provide financial management services to a CDS employer.
New Reason	EVV Reason Code Number and Description	Reason Code Numbers represent the overall issue for the need to complete visit maintenance. Reason Code Descriptions provide more detail about why visit maintenance was completed on an EVV visit transaction. In HHAX, select the Reason Code Number and Description from the **New Reason** list.
Representative	Designated Rep-	Person designated by the CDS employer (member or

HHAX Term	Texas Term	Definition
	resentative (DR)	Legally Authorized Representative) to assist or perform CDS and EVV responsibilities in the CDS option.
Secondary Identifier	API (Atypical Provider Identifier)	Unique number assigned to a program provider or FMSA instead of a National Provider Identifier (NPI) number. The Centers for Medicare and Medicaid Services (CMS) defines atypical program providers as a program provider that does not provide healthcare.
Service Code	Healthcare Common Procedure Coding System (HCPCS) + Modifier	A collection of codes that represent procedures and services provided to individuals , based on the American Medical Association's Current Procedural Terminology (CPT).
Service Location	Service Delivery Location	Location where EVV services were provided. Valid values are Member Home, Family Home, Neighbor Home, and Community.
Shift	Visit	Time elapsed between the time the service provider clocked in for service delivery using an HHSC-approved method and the time the service provider clocked out for service delivery using an HHSC-approved method.
UPR	---	Universal Patient Record (Linked Contract Patient)
Visit Time In	Bill Time In	Time the service provider clocked in for service delivery using an HHSC-approved clock-in method (auto-populated from the EVV Clock In when present on the visit).
Visit Time Out	Bill Time Out	Time the service provider clocked out for service delivery using an HHSC-approved clock-in method (auto-populated from the EVV Clock Out when present on the visit).

Downloading the Mobile App

The HHAeXchange+ Mobile App is available for download through the App Store or Google Play for iPhone or Android devices.

Caregivers are responsible for downloading and installing the HHAeXchange+ Mobile App onto their personal mobile device.

To locate and download the App, enter the keyword *HHAeXchange+* in the search bar of the App Store or Google Play.
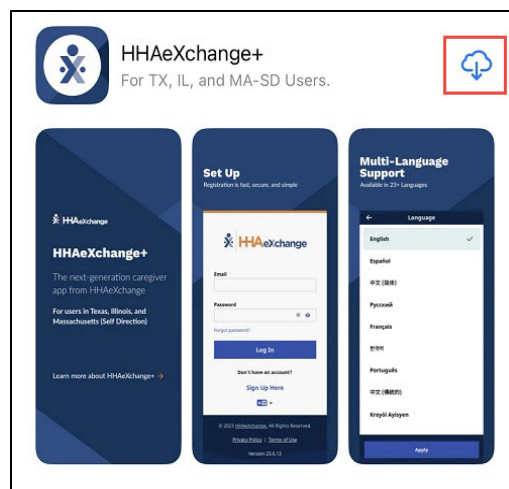
App Store

Caution: Be sure to download the ***HHAeXchange+*** app, not the older HHAeXchange mobile app.

After installing the Mobile App, Caregivers must use the app to Sign Up with HHAX and connect to one or more Agencies in order to use the Mobile App.

Sign Up Here

Note: The first time you open the Mobile App, you must select your preferred language and tap ***Apply***.
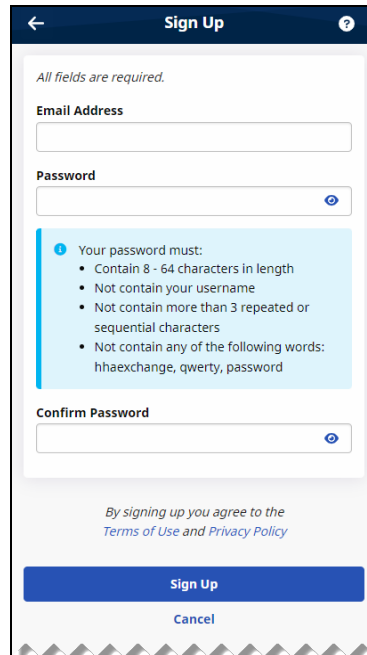
To sign up for and log in to the Mobile App,

1. From the *Login Page*, tap ***Sign Up Here***.
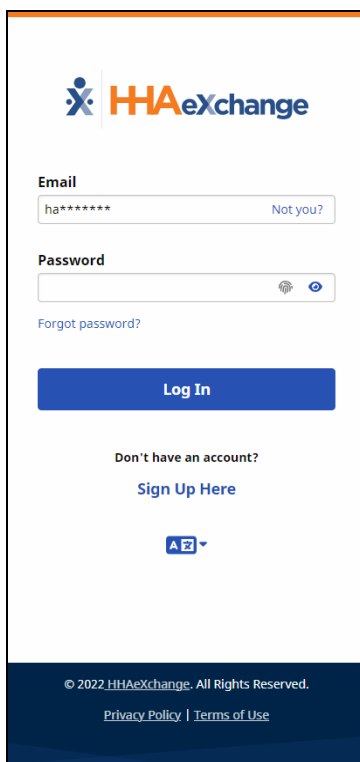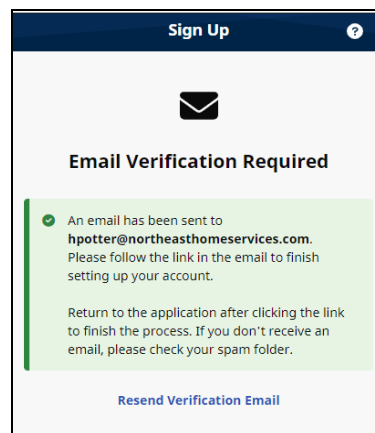
Log-In Page

2. On the *Sign-Up* page, type your **Email Address** and a strong **Password**.
   Tip: Tap the eye icon to see your **Password** entry.
3. Type your password again in **Confirm Password**, and then tap *Sign Up*.

Sign Up Here

4. On the *Email Verification Required* page, follow the instructions to open the verification email sent to your email address by HHAX, and then follow the instructions in the email to proceed with on-boarding.

Email Verification

Note to HHAeXchange Services Portal users: If you sign up for the Services Portal before signing up for HHAeXchange+, you must still enter your Email Address and Password to sign up for HHAeXchange+. If you sign up for HHAeXchange+ first, after you verify the Email Address, you can use the same credentials to log into the Services Portal as well.

5. When the *Finish Account Setup* page is displayed, answer the question: "How will you use this application?" If you are instructed by your Agency/Employer to use the app for EVV and to document your visit/shift detail, tap ***Perform Electronic Visit Verification (EVV)***. If you are only using the app to answer *Care Insights* questions, tap ***Only answer daily patient questions***.
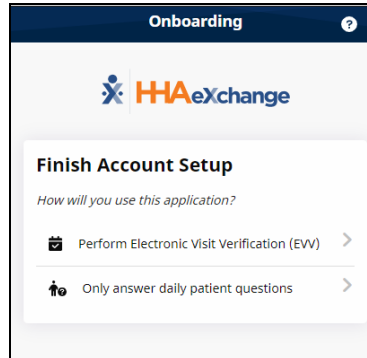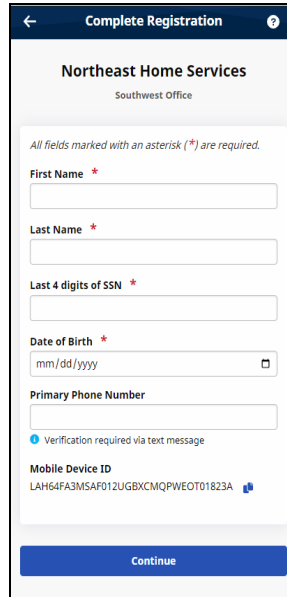

Finish Account Setup

When you tap ***Perform Electronic Visit Verification (EVV)***…

    a. On the *Connect your Account* page, type the **Activation Code** provided by the Agency/Employer via email or text (valid for 7 days), and tap ***Submit Code***.
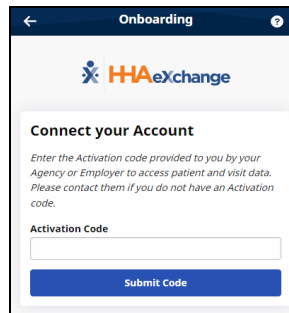
Activation Code

b. On the *Complete Registration* page, complete all required fields (marked with *****) and then tap **Continue**.
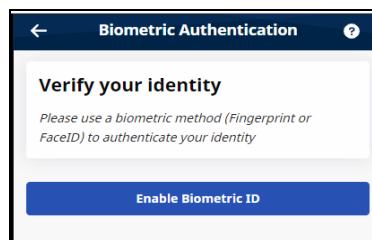
Complete Registration

> **Note:** You must respond to an email verification of your **Primary Phone Number** before you can continue.

c. If your Agency/Employer uses Two-Factor Authentication and the *Biometric Authentication* page is displayed, tap the method you will use to verify your identity.

If you tap **Use your fingerprint**, when prompted, place your identifying finger on your phone's fingerprint sensor.

If you tap **Use facial recognition**, when prompted, orient your front-facing camera toward your face.

Biometric Authentication

d. If the *Third-Party Terms* page is displayed, read the terms and acknowledge them by tapping **Accept Terms**.
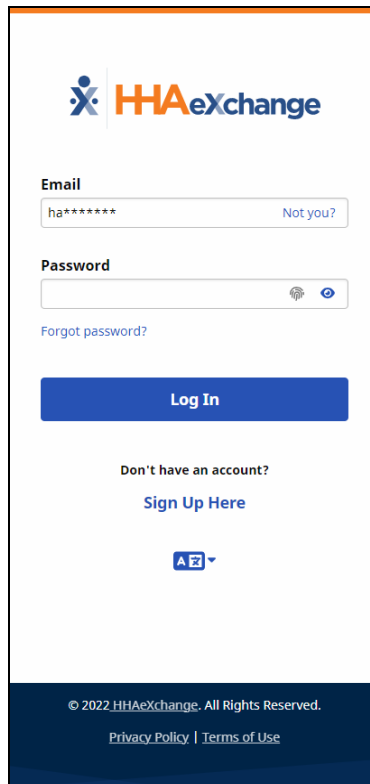
> **Note:** You must log in at least one time with Email and Password before using Biometric Authentication.

You are logged in, and the *Schedule* page is displayed.

Log In Page

From the Log In page, you can perform the following tasks:

- **Log In** to the Mobile App.
- **Sign Up Here** to use the Mobile App if you have not already been set up to use the Mobile App.
- Change the Mobile App User Password with the **Forgot Password** function.
- Change the language in which the Mobile App and Mobile App Help are displayed by tapping the **Select Language** icon.
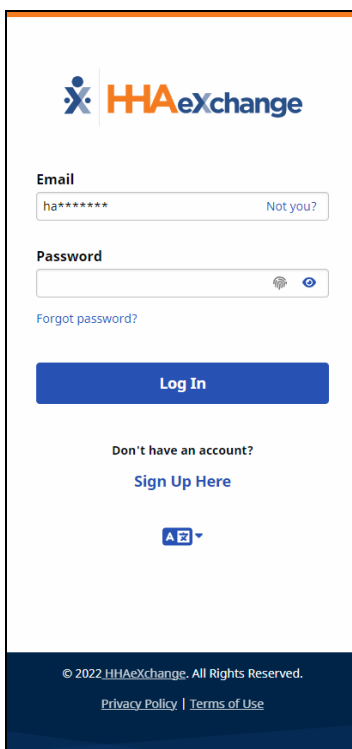

Log In page

Note: From the Log In page footer, you can access the Mobile App's **Privacy Policy** and **Terms of Use**.

Log In

To log in to the Mobile App,

On the *Log In Page*, type your valid **Email** Address and **Password**, and then tap ***Log In***.
If prompted to do so, select your Agency/Employer.

Log-In Page

You are logged in, and the *Schedule* page is displayed.

If you log in before the Sign-Up process has been completed, you are returned to the Sign Up page.

Tip: Tap ***Not you?*** in **Email** to enter a different Email Address.

Tip: To see the characters entered in **Password**, tap the eye icon in the **Password** field.

Note: You can tap an enabled fingerprint icon in the **Password** field to use a Biometric Log In (Finger-print or Facial ID).

Biometric Log In

You can log in with *Fingerprint Authentication* or *Facial Recognition* if the capability is enabled on your phone.

For Biometric Log In to be available, you must have logged into the Mobile App using **Email** and **Password** at least one time. After that, you can tap the fingerprint icon at the right of the **Password** field to access your phone's fingerprint authentication or facial recognition biometric page.

Note: If the Agency/Employer requires *Two Factor Authentication*, you must also provide a **Password** on the *Log In* page before tapping the fingerprint icon.

After providing a matching fingerprint or facial scan, you are allowed access to the Mobile App.

Note: If you change or reset your password, the Biometric Log In option is reset. You must log into the Mobile App using **Email** and **Password** and log out at least one time before the Biometric Log In option becomes available again.

Menu

Using the Mobile App, you can keep track of your schedule, receive and respond to messages from your Office/Agency, and Clock In and Out of Visits.

The Menu is divided into three sections (**Tools**, **Settings & Help**, **Legal**) with a **Navigation Bar** displayed at the bottom.

Tools

My Availability

If configured by the Agency, allows you to review and adjust your schedule Availability preferences.

Settings & Help

Profile

Used to maintain your Caregiver information.

Change Password

Used to change your Mobile App Login password.

Connections

Used to switch between Agencies/Offices connected to you, the Caregiver.

Help

Used to access the Mobile App Help table of contents. Context-sensitive Help is available from most Mobile App pages by tapping the Help icon (question mark) at upper right.

App Feedback

Used to request enhancements, provide general comments, identify issues, and correct alternate language translations.

Select Language

Used to change the language in which the Mobile App and Mobile App Help are displayed.

Visual Theme

Used to change the mobile app display from the default Standard to a Dark or High Contrast theme.

Legal

Privacy Policy

Notice of privacy limits when using the Mobile App.

Terms of Use

HHAX terms, conditions, and restrictions under which you may or may not use aspects of the Mobile App.

Third Party Terms

If configured by the Agency, third-party software developer terms, conditions, and restrictions under which you may or may not use aspects of the Mobile App.

Navigation Bar

Schedule

Used to Clock In and Out of Scheduled Visits and to review all Scheduled Visits up to two weeks in advance (and up to one week in the past). You can create an Unscheduled Visit for any Patient to whom you have access from the *Schedule* page by tapping **+New Unscheduled Visit**.

Patients

Used to view a list of all Patients you can access. You can create an Unscheduled Visit for any Patient to whom you have access from the *Patients* page by tapping **New Visit**.

Menu

Returns you from any point in the Mobile App to the Menu.

Schedule Visits - Clock In/Clock Out

From the *Schedule* page, you can Clock In and Out of a Visit, entering Plan of Care Duties and gathering required Signatures.
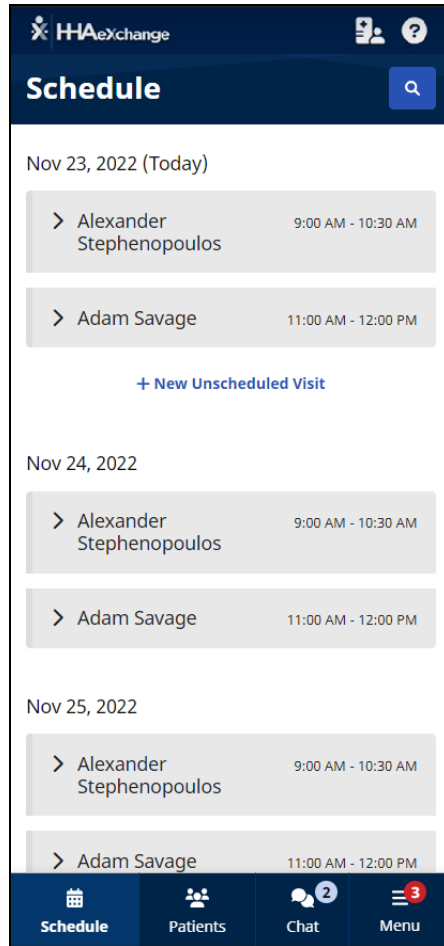
Schedule page

The *Schedule* page shows your scheduled visits for today and tomorrow. You can tap the **Search** icon (magnifying glass) at top right to view previous visits.

Select from the following Visit Types for specific instructions:
Scheduled Visit
Unscheduled Visit
Consecutive Shifts
Linked and Mutual Patients

Tip: You can change Connections by tapping the ***Change Connection*** icon at top right (beside the *Help* icon) on the Schedule Page.

Note: If configured by the Agency, you can edit a visit that has already transpired. From the *Schedule* page, expand the visit and tap ***View/Edit Visit*** to adjust the duties associated with the visit. If allowed, from the *Visit Details* page, you can tap ***Edit Visit Time*** (upper right) to adjust Clock In and Clock Out times.

Scheduled Visit

To Clock In for a Scheduled Visit:

1. From the *Schedule* page, select the patient visit to expand Visit Details.

   From the Visit Details, you can view:
   Schedule Time - Scheduled Start Time and End Time of Visit. (For Daily Variable Visits, displays the authorized duration of the Visit and a clock tracking the Visit time used.)
   Visit Type - Skilled or Unskilled
   Patient Details - Patient Name, Admission ID, assigned Office, Phone Numbers, Addresses, Emergency Contacts, and, if configured, Clinical Information
   Visit Details - If configured, Plan of Care Tasks, Care Insights Questions, Medications, and Add Note

   Note: If the patient visit is not on the Schedule page, tap *+New Unscheduled Visit* to create an Unscheduled Visit.
   If you don't see a particular Scheduled Visit, tap the *Search* icon (magnifying glass) at the top of the page to search for a Shift by **Patient Name**, **Date Range**, and **Visit Type**.

2. From the Visit Details, tap *Clock In*.
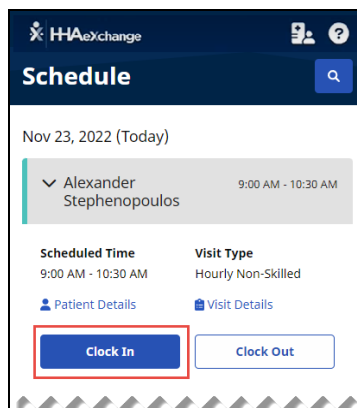
Scheduled Visit Details

3. If configured by the Agency, on the Electronic Visit Verification page, select *GPS* or *Security Token* as the EVV method.
    - If you select *GPS*, after you allow the app access to your location, you can use the map to help locate the Patient Address, and (if configured by the Agency) you can change the **Service Delivery Location** from the Member's Home to another value to bypass the need for proximity to the Patient Address.
    - If you select *Security Token*, you are prompted to enter the six-digit **Device ID** and **Passcode**.
    - When you are finished, tap *Continue*.
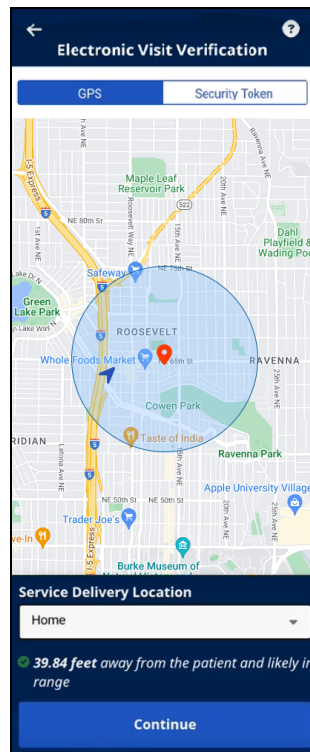
Electronic Visit Verification

4. If required, obtain a **Patient Signature**, an **RN (Coordinator) Signature**, and a **Caregiver Signature**, and tap *Submit*, or tap *Skip* if available and select the reason for skipping.
5. If required, obtain **Patient Voice Consent** (**Record**, **Stop Recording**) and tap *Done*, or tap *Skip* if available, and select the reason for skipping.

The Visit Details page is displayed.
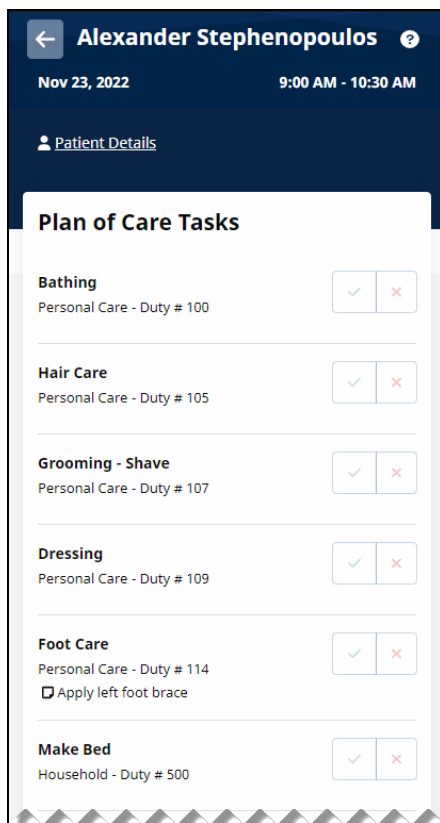
Scheduled Visit Details

To Clock Out for a Scheduled Visit:
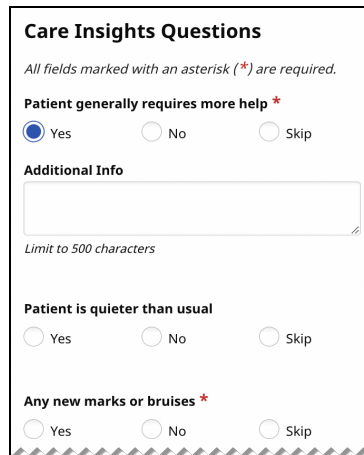
1. If you have Non-EVV Services to record (and the Agency is configured to allow it), tap the checkmark to select **Non-EVV Services** and select the **Duration** of Non-EVV Services in *Hours* and *Minutes*.

2. If the Visit includes a Plan of Care (or Other Duties have been added), select the duties performed (checkmark) and duties refused (X). Select any required **Value** for duties performed and any **Refused Duty Reason** the Agency requires.
   Tip: You can add other duties that the Agency has configured for the visit by tapping *+ Add Other Duties*.

Duties

3. If the Visit includes Care Insight Questions, answer all required questions, and provide **Additional Info** as needed. Tap *Save Responses*.

Care Insights Questions

4. If you want to add a note about the visit, tap ***Add Note***.
5. When you are finished, tap ***Clock Out*** at the bottom of the page.

Clock Out

6. If required, on the Electronic Visit Verification page, update ***GPS*** or ***Security Token*** settings and tap ***Continue***.
7. If required, obtain **Patient Signature** and any other required signatures and tap ***Submit***, or tap ***Skip*** if available and select the reason for skipping.

8. If required, obtain **Patient Voice Consent** (**Record**, **Stop Recording**) and tap *Done*, or tap *Skip* if available, and select the reason for skipping.

Back to Visits - Clock In and Clock Out

Unscheduled Visit

You can select **+ *New Unscheduled Visit*** from the *Schedule* page to create a new *Unscheduled Visit*. You can create an *Unscheduled Visit* for any Patient to whom you have access, whether or not you have previously worked with the Patient.

Note: A New (Unscheduled) Visit can also be created from the *Patients* Page.

To create an Unscheduled Visit from the *Schedule* page:

1. Tap **+*New Unscheduled Visit***.
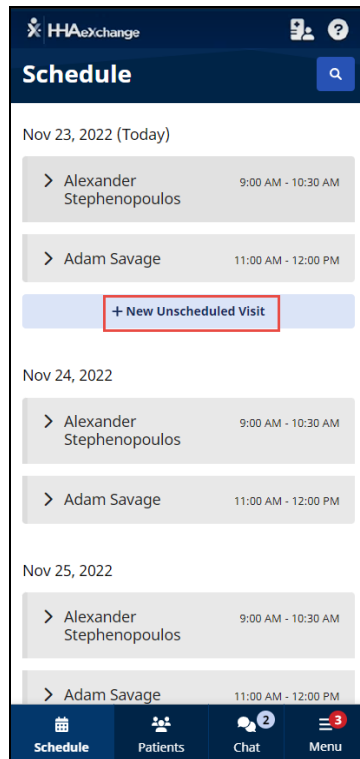
Unscheduled Visit

2. On the *New Visit* page, select the patient, or use the Search function at the top of the page to look up and select a Patient. If a matching visit is already scheduled with the Patient, the Mobile App gives you the option of using that Scheduled Visit instead of this New Unscheduled Visit.
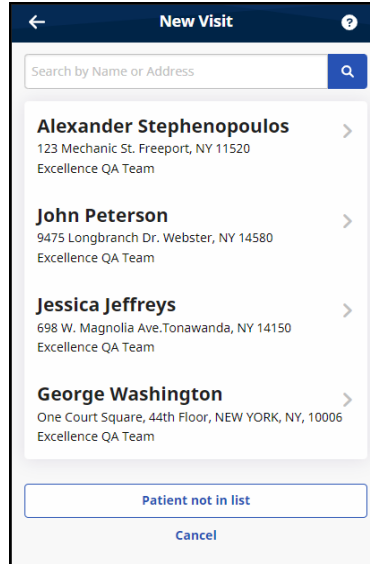
Select Patient

3. If configured by the Agency, on the Electronic Visit Verification page, select **GPS** or **Security Token** as the EVV method.
   - If you select **GPS**, after you allow the app access to your location, you can use the map to help locate the Patient Address, and (if configured by the Agency) you can change the **Service Delivery Location** from *Home* to another value to bypass the need for proximity to the Patient Address.

EVV GPS page

- If you select *Security Token*, you are prompted to enter the six-digit **Device ID** and **Passcode**.
- When you are finished, tap *Continue*.

4. If required, obtain a **Patient Signature**, an **RN (Coordinator) Signature**, and a **Caregiver Signature**, and tap *Submit*, or tap *Skip* if available and select the reason for skipping.

5. If required, obtain **Patient Voice Consent** (**Record**, **Stop Recording**) and tap *Done*, or tap *Skip* if available, and select the reason for skipping.

The Visit Details page is displayed.

Visit Details

To Clock Out of an Unscheduled Visit:

1. If required, select a **Service Code** in *Visit Settings*.
2. If you have Non-EVV Services to record (and the Agency is configured to allow it), tap the check-mark to select **Non-EVV Services** and select the **Duration** of Non-EVV Services in *Hours* and *Minutes*.
3. If the Visit includes a Plan of Care (or Other Duties have been added), select the duties performed (checkmark) and duties refused (X). Select any required **Value** for duties performed and any **Refused Duty Reason** the Agency requires.
   Tip: You can add other duties that the Agency has configured for the visit by tapping *+ Add Other Duties*.

Duties

4. If the Visit includes Care Insight Questions, answer all required questions, and provide **Additional Info** as needed. Tap *Save Responses*.

Care Insights Questions

5. If you want to add a note about the visit, tap **Add Note**..
6. When you are finished, tap **Clock Out** at the bottom of the page.

Clock Out

7. If required, on the Electronic Visit Verification page, update *GPS* or *Security Token* settings and tap *Continue*.
8. If required, obtain **Patient Signature** and any other required signatures and tap *Submit*, or tap *Skip* if available and select the reason for skipping.

9. If required, obtain **Patient Voice Consent** (**Record**, **Stop Recording**) and tap *Done*, or tap *Skip* if available, and select the reason for skipping.

Back to Visits - Clock In and Clock Out

Consecutive Shifts

When enabled by the Agency, the *Consecutive Shifts* feature allows you to perform a single Clock-In and Clock-Out for multiple Consecutive Shifts for the same Patient or for one Consecutive Shift for two Linked Patients, such as a husband and wife receiving back-to-back services at the same address.

Consecutive Shifts for a Single Patient

To Clock In for a Single Patient Consecutive Shift (two or more shifts):

1. From the ***Schedule*** page, tap the shift for a single Patient with scheduled consecutive visits. Visit Details are displayed with the Start Time of the first shift and the End Time of the last shift.
2. Tap ***Clock In*** to begin the Consecutive Shift.
3. If configured by the Agency, on the Electronic Visit Verification page, select ***GPS*** or ***Security Token*** as the EVV method.
   - If you select ***GPS***, after you allow the app access to your location, you can use the map to help locate the Patient Address, and (if configured by the Agency) you can change the **Service Delivery Location** from *Home* to another value to bypass the need for proximity to the Patient Address.

EVV GPS page

   - If you select ***Security Token***, you are prompted to enter the six-digit **Device ID** and **Passcode**.
   - When you are finished, tap ***Continue***.
4. If required, obtain a **Patient Signature**, an **RN (Coordinator) Signature**, and a **Caregiver Signature**, and tap ***Submit***, or tap ***Skip*** if available and select the reason for skipping.

5. If required, obtain **Patient Voice Consent** (**Record**, **Stop Recording**) and tap *Done*, or tap *Skip* if available, and select the reason for skipping.

When Clocked In, the Confirmed time (Start Time for the Consecutive Shift) is the Start Time of the first shift.

To Clock Out of a Single Patient Consecutive Shift (two or more shifts):

1. When the first shift's details are displayed, if you have Non-EVV Services to record (and the Agency is configured to allow it), tap the checkmark to select **Non-EVV Services** and select the **Duration** of Non-EVV Services in *Hours* and *Minutes*.

2. If a Plan of Care is included (or Other Duties have been added), select the duties performed (checkmark) and duties refused (X). Select any required **Value** for duties performed and any **Refused Duty Reason** the Agency requires.

Plan of Care Duties

Tip: You can add other duties that the Agency has configured for the visit by tapping *+ Add Other Duties*.

3. If the first shift includes Care Insight Questions, answer all required questions, and provide **Additional Info** as needed. Tap *Save Responses*.

Care Insights Questions

All fields marked with an asterisk (*) are required.

Patient generally requires more help *

(●) Yes   ( ) No   ( ) Skip

Additional Info

Limit to 500 characters

Patient is quieter than usual
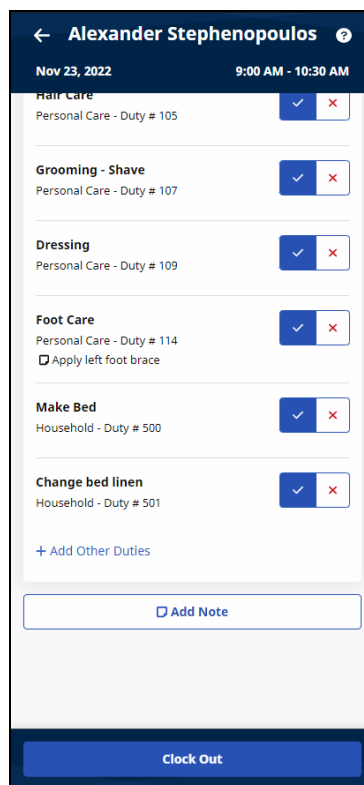
( ) Yes   ( ) No   ( ) Skip

Any new marks or bruises *

( ) Yes   ( ) No   ( ) Skip

Care Insights Questions

4. If you want to add a note about the first shift, tap ***Add Note***.
5. When you are finished documenting the first shift, tap ***Continue*** at the bottom of the page to display the next consecutive shift's details.
6. When the next consecutive shift's details are displayed, complete the same steps (1-4) for that shift. When you finish documenting the last consecutive shift, tap ***Clock Out*** at the bottom of the page.
7. If required, on the Electronic Visit Verification page, update ***GPS*** or ***Security Token*** settings and tap ***Continue***.
8. If required, obtain **Patient Signature** and any other required signatures and tap ***Submit***, or tap ***Skip*** if available and select the reason for skipping.
9. If required, obtain **Patient Voice Consent** (**Record**, **Stop Recording**) and tap ***Done***, or tap ***Skip*** if available, and select the reason for skipping.

After the Consecutive Shift is completed, the Consecutive Shift association is broken. You can only access each shift as an individual shift to make edits for the length of time after Clock Out allowed by the Agency. To make edits, return to the *Schedule* page, and select any shift in the Consecutive Shift sequence to apply updates to that specific shift by tapping ***View/Edit Visit***.

Notes:
- If you Clock Out before the planned end of all shifts and don't Clock In for the remaining shifts, the remaining shifts are marked as Missed.
- If any shift in a Consecutive Shift sequence wasn't started, you can Clock In to that shift and complete it. If these are multiple shifts, they are treated as a new Consecutive Shift.
- Consecutive Shifts for a Single Patient and Consecutive Shifts for two Linked Patients cannot be co-mingled.
- Consecutive Shifts don't allow rounding at the contract level when there are multiple contracts with different rounding methods for the same Patient.
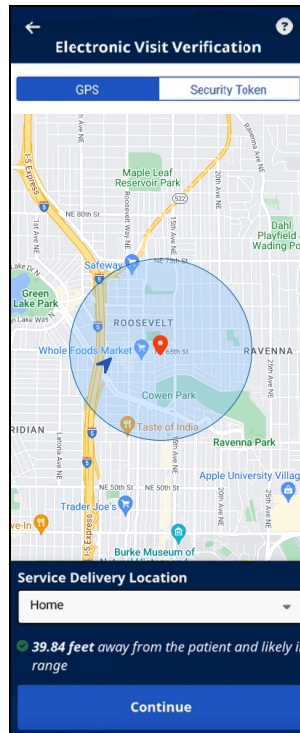
Consecutive Shifts for Linked Patients (Internal Contract)

Linked Patients are labeled as such on the *Schedule* page and are designated with a **chain link icon**.

To Clock In for a Linked Patients Consecutive Shift:

1. From the *Schedule* page, tap the first shift in the Linked Patient Consecutive Shift. Visit Details are displayed with the Start Time of the first shift and the End Time of the last shift. All Linked Patient names are listed.
2. Tap **Clock In** to begin the Consecutive Shift.
3. If configured by the Agency, on the Electronic Visit Verification page, select **GPS** or **Security Token** as the EVV method.
   - If you select **GPS**, after you allow the app access to your location, you can use the map to help locate the Patient Address, and (if configured by the Agency) you can change the **Service Delivery Location** from *Home* to another value to bypass the need for proximity to the Patient Address.

EVV GPS page

   - If you select **Security Token**, you are prompted to enter the six-digit **Device ID** and **Passcode**.
   - When you are finished, tap **Continue**.
4. If required, obtain a **Patient Signature** for each of the linked patients, an **RN (Coordinator) Signature**, and a **Caregiver Signature**, and tap **Submit**, or tap **Skip** if available and select the reason for skipping.
5. If required, obtain a **Patient Voice Consent** (**Record**, **Stop Recording**) for each of the linked patients and tap **Done**, or tap **Skip** if available, and select the reason for skipping.

When Clocked In, the Confirmed time is the Start time for the Consecutive Shift.

To Clock Out of a Linked Patients Consecutive Shift:

1. If you have Non-EVV Services to record (and the Agency is configured to allow it), tap the check-mark to select **Non-EVV Services** and select the **Duration** of Non-EVV Services in *Hours* and *Minutes*.

2. If the Visit includes a Plan of Care (or Other Duties have been added), select the duties performed (checkmark) and duties refused (X) *for the first linked patient*. Select any required **Value** for duties performed and any **Refused Duty Reason** the Agency requires.

Plan of Care Duties

Tip: You can add other duties that the Agency has configured for the visit by tapping ***+ Add Other Duties***.

3. If the Visit includes Care Insight Questions, answer all required questions, and provide **Additional Info** as needed. Tap ***Save Responses***.

Care Insights Questions

4. If you want to add a note about the visit, tap ***Add Note***.
5. When you are finished, tap ***Continue*** at the bottom of the page.
6. When the *next linked patient's visit* is displayed, complete the same steps (1-4) for that linked patient. When you finish documenting the visit for that linked patient, tap ***Clock Out*** at the bottom of the page.
7. If required, on the Electronic Visit Verification page, update ***GPS*** or ***Security Token*** settings and tap ***Continue***.
8. If required, obtain a **Patient Signature** for each linked patient and any other required signatures and tap ***Submit***, or tap ***Skip*** if available and select the reason for skipping.
9. If required, obtain a **Patient Voice Consent** (**Record**, **Stop Recording**) for each linked patient and tap ***Done***, or tap ***Skip*** if available, and select the reason for skipping.

After the Consecutive Shift is completed, the Consecutive Shift association is broken. You can only access each shift as an individual shift to make edits for the length of time after Clock Out allowed by the Agency. To make edits, return to the *Schedule* page, and select any shift in the Consecutive Shift sequence to apply updates to that specific shift.

Notes:
- If you Clock Out before the planned end of all shifts in the sequence, the remaining shifts are marked as Missed.
- If the second shift in a two patient Linked Consecutive Shift sequence wasn't started, you can Clock In to the second shift to complete it.
- Consecutive Shifts for a Single Patient and Consecutive Shifts for two Linked Patients cannot be co-mingled.
- Consecutive Shifts don't allow rounding at the contract level when there are multiple contracts with different rounding methods for a Patient.
- Clock Out for the first shift and Clock In for the second are derived from the scheduled duration of the first shift. The Clock Out time recorded is used as the End time for the second shift.

Back to Visits - Clock In and Clock Out

Linked and Mutual Visits

Linked Patient Visits

Linked Patient Visits (when not handled as a Consecutive Shift) are treated as two individual shifts, each shift requiring Clock In and Clock Out.

Linked Patients are labeled as such on the *Schedule* page and are designated with a ***chain link icon***.

1. *Clock In* for Linked Patient 1 as you would for any Scheduled Visit.
2. Perform Linked Patient 1 Duties.
3. *Clock Out* for Linked Patient 1 as you would for any Scheduled Visit.

When complete, the Mobile App reports a successful Clock Out for Linked Patient 1.

1. *Clock In* for Linked Patient 2 as you would for any Scheduled Visit.
2. Perform Linked Patient 2 Duties.
3. *Clock Out* for Linked Patient 2 as you would for any Scheduled Visit.

When complete, the Mobile App reports a successful Clock Out for Linked Patient 2.

Mutual Patient Visits

Mutual Patient Visits are treated as two separate patient visits handled at the same time, with Clock In and Clock Out performed from either of the two visits.

Mutual Patients are labeled as such on the Schedule page and are designated with a ***two-person silhouette icon***.

1. Tap **Clock In** for a Mutual Patient Visit, and both patient visits indicate the same Clock In time.
2. If required for the first patient, enter Plan of Care (or Other Duties), answer Care Insight Questions, and then tap **Continue**.
3. If required for the second patient, enter Plan of Care (or Other Duties), answer Care Insight Questions, and then tap **Clock Out**.

When you tap **Clock Out**, *both Visits are Clocked Out*.

Back to Visits - Clock In and Clock Out

Visit Notes

Follow these steps to enter a Visit Note.

1. From the bottom of the Visit Details page, tap **Add Note**.
2. Select the Note Type
   - **Text Note**- Up to 1000 characters.
   - **New Camera Image** - Opens the phone's camera, allowing you to take a photo and add a description up to 500 characters.
   - **File** - Opens a Search page where you can browse the phone for a file to attach.
   - **Voice Note** - Opens a recorder where you can record and save audio comments.
3. Obtain and attach the Note, and then tap **Save**.

Add Note

From the Visit Details page:
- To view an attached note, tap it.
- To edit an attached note, tap the **Edit** icon (pencil).
- To delete an attached note, tap the **Delete** icon (trash can).

Daily Variable Visit

When the Agency uses the *Daily Variable Schedule Type*, an amount of Visit Time is authorized per Day per Patient, but no specific daily Visit Hours are designated.

On the *Schedule* page, the authorized Visit Time is displayed next to the Patient name.

In *Visit Details*, the authorized Visit Time is displayed along with a clock tracking the Visit Time used.
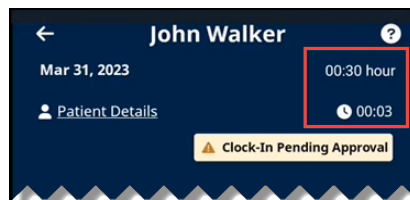
Daily Variable Visit Time in Visit Details

The Caregiver is alerted when 15 minutes of authorized Visit Time remains, and a countdown to the expiration of authorized Visit Time is displayed.
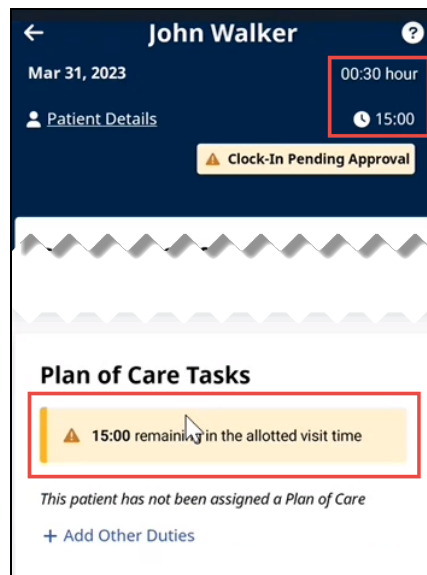
Daily Variable Visit 15 Minutes Remaining Alert

The Caregiver is alerted when the authorized Visit Time has been exceeded.
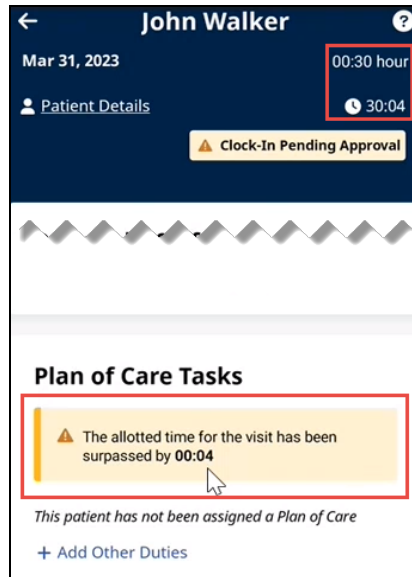
Daily Variable Visit Time Exceeded

If the Caregiver does not end the Visit within the Agency's designated grace period (default of seven minutes), the Visit's EVV record is routed to the Agency's Call Dashboard for review and remediation.

Edit Visit Time

If configured by the Agency, you can edit the time of an EVV Visit that has already been completed.

To edit Visit Time,

1. From the *Schedule* page, tap the completed Visit.
2. On the *Visit Details* page, tap the **Edit Visit Time** icon (pencil) on the Clock In message at upper right.
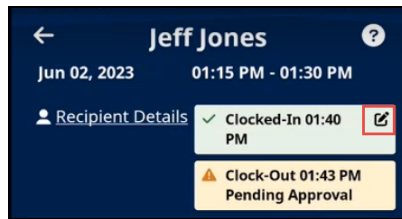
Tap Edit icon

3. On the *Edit Visit Time* page, select the From and To values for the **New Visit Time**.
4. When prompted, select a **Reason** for your change.
5. Provide **Additional Information** to explain your change.
6. When finished, tap *Save*.
7. If prompted, obtain a **Patient Signature**, and *Clock Out*.
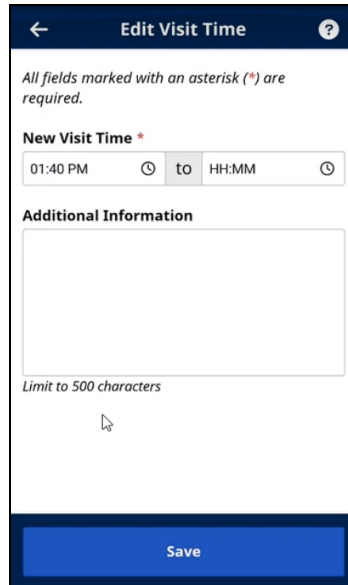
Edit Visit Time page

Your Time Edit is submitted to your Agency for approval.

Patients

The *Patients* page lists Patients that you have visited in the past or are scheduled to visit.
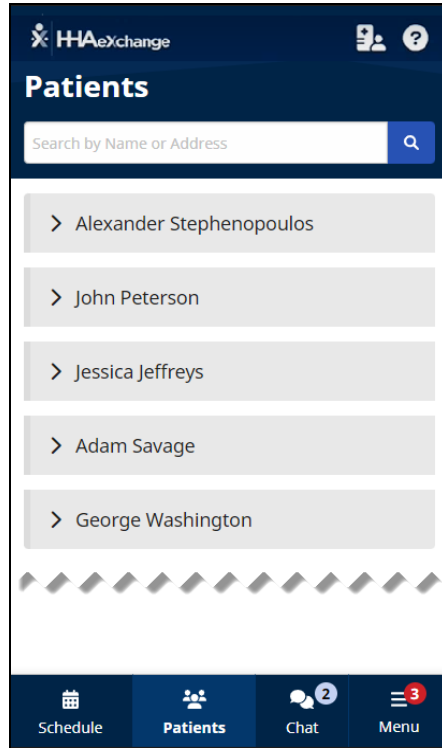
Patients

Select a listed Patient, or type part of a Patient's name and tap the ***Search*** icon (magnifying glass) to look up a Patient you are authorized to visit. When you select a Patient, you can view *Patient Details* and *View Visits*. If you are authorized, Patient Details may include *Clinical Info* and *Medications*.
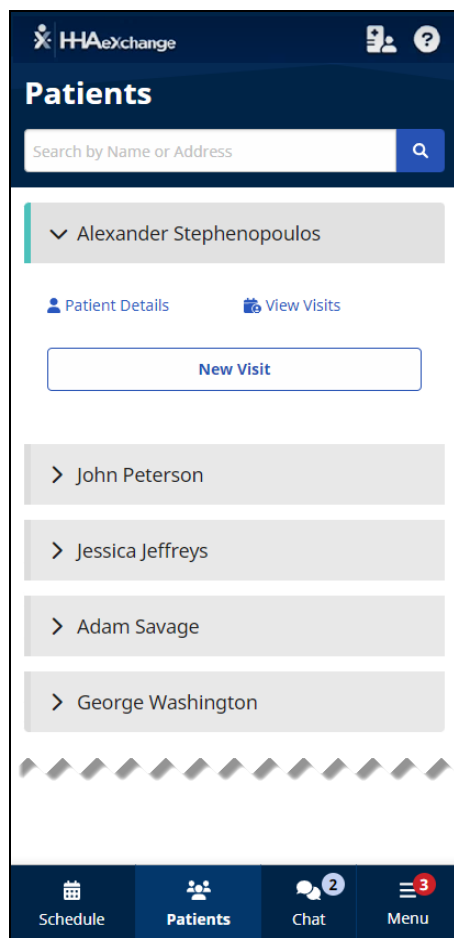
Select a Patient

Patient Details include Patient Name, Admission ID, assigned Office, Phone Numbers, Addresses, Emergency Contacts, and, if configured, Clinical Information.
Visit Details (if configured) include Plan of Care Tasks, Care Insights Questions, Add Note, and Medications.

You can select **New Visit** from the *Patients* page to create a new *Unscheduled Visit*. You can create an *Unscheduled Visit* for any Patient to whom you have access, whether or not you have previously worked with the Patient.

To create a New Visit from the *Patients* page:

1. Select the patient or use the Search function at the top of the page to look up and select a Patient.
2. Tap **New Visit**. If a matching visit is already scheduled with the Patient, the Mobile App gives you the option of using that Scheduled Visit instead of this New Visit.
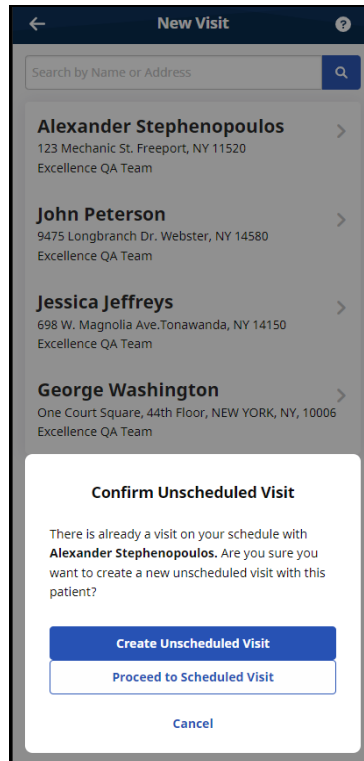
Unscheduled Visit

3. If configured by the Agency, on the Electronic Visit Verification page, select **GPS** or **Security Token** as the EVV method.
   - If you select **GPS**, you can use the map to help locate the Patient Address, and (if configured by the Agency) you can change the **Service Delivery Location** from the Member's Home to another value to bypass the need for proximity to the Patient Address.
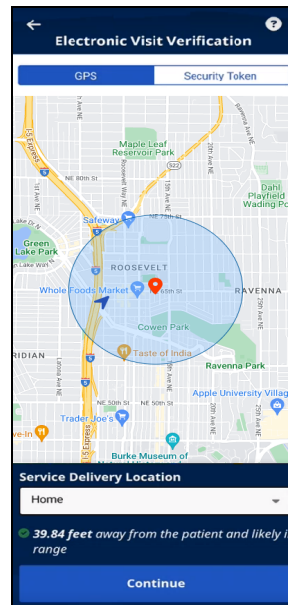
EVV GPS page

- If you select *Security Token*, you are prompted to enter the six-digit **Device ID** and **Passcode**.
- When you are finished, tap *Continue*.

4. If required, obtain **Patient Signature** and tap *Submit*, or tap *Skip* if available, and select the reason for skipping.

5. If required, obtain **Patient Voice Consent** (**Record**, **Stop Recording**) and tap *Done*, or tap *Skip* if available, and select the reason for skipping.

On the Visit Details page, you can view:

Schedule Time - Scheduled Start Time and End Time of Visit

Patient Details - Patient Name, Admission ID, assigned Office, Phone Numbers, Addresses, Emergency Contacts, and, if configured, Clinical Information
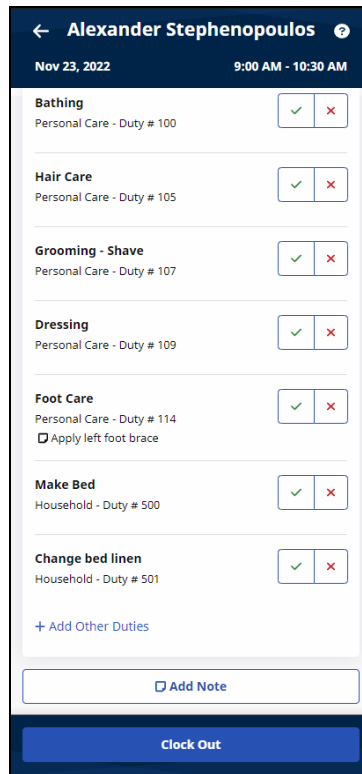
Visit Details - If configured, Plan of Care Tasks, Care Insights Questions, Add Note, and, if configured, Medications
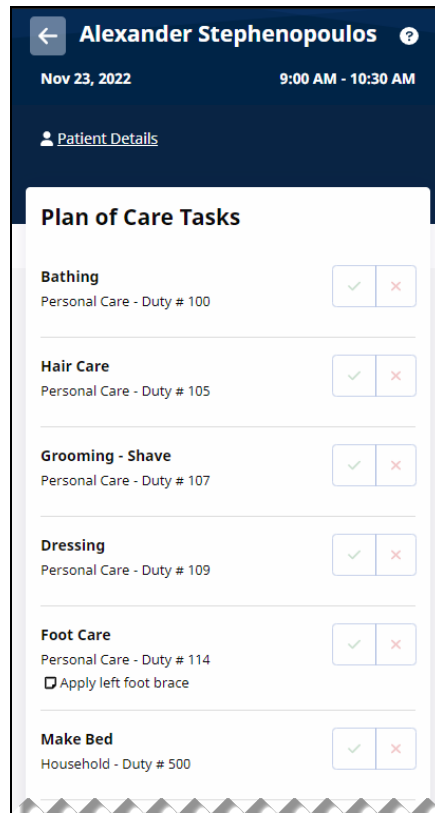
Unscheduled Visit Details
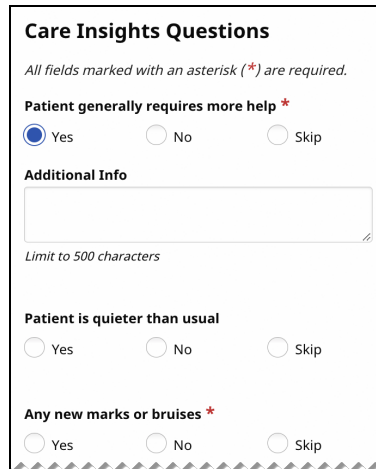
To Clock Out of a New Visit:

1. If required, select a **Service Code** in *Visit Settings*.
2. If you have Non-EVV Services to record (and the Agency is configured to allow it), tap the check-mark to select **Non-EVV Services** and select the **Duration** of Non-EVV Services in *Hours* and *Minutes*.
3. If the Visit includes a Plan of Care (or Other Duties have been added), select the duties performed (checkmark) and duties refused (X). Select any required **Value** for duties performed and any **Refused Duty Reason** the Agency requires.

Duties

4. If the Visit includes Care Insight Questions, answer all required questions and provide **Additional Info** as needed. Tap *Save Responses*.

Care Insights Questions

5. If you want to add a note about the visit, tap **Add Note**...
6. When you are finished, tap **Clock Out** at the bottom of the page.
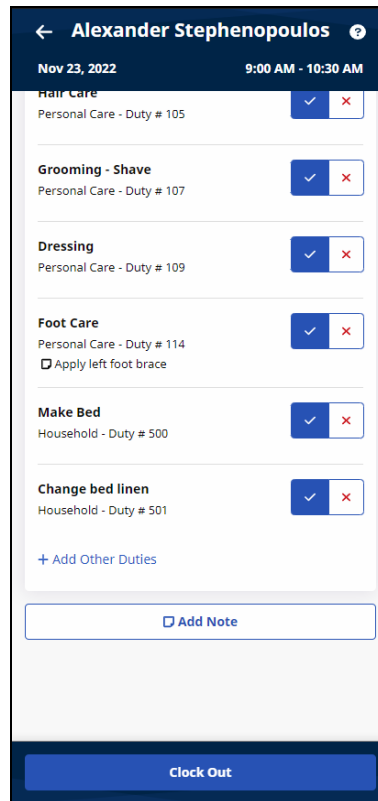
Clock Out

7. If required, obtain a **Patient Signature**, an **RN (Coordinator) Signature**, and a **Caregiver Signature**, and tap ***Submit***, or tap ***Skip*** if available and select the reason for skipping.

8. If required, obtain **Patient Voice Consent** (**Record**, **Stop Recording**) and tap ***Done***, or tap ***Skip*** if available, and select the reason for skipping.

Visit Notes

Follow these steps to enter a Visit Note.

1. From the bottom of the Visit Details page, tap ***Add Note***.
2. Select the Note Type
   - ***Text Note***- Up to 1000 characters.
   - ***New Camera Image*** - Opens the phone's camera, allowing you to take a photo and add a description up to 500 characters.
   - ***File*** - Opens a Search page where you can browse the phone for a file to attach.
   - ***Voice Note*** - Opens a recorder where you can record and save audio comments.
3. Obtain and attach the Note, and then tap ***Save***.

Add Note

From the Visit Details page:

- To view an attached note, tap it.
- To edit an attached note, tap the ***Edit*** icon (pencil).
- To delete an attached note, tap the ***Delete*** icon (trash can).

Care Insights Questions

Care Insights Questions are Yes/No questions to the Caregiver that evaluate patient health. For example, "Is the patient eating less than usual?"

You may be prompted with *Care Insights* questions during Clock-Out (after entering Duties). You can answer *Care Insights* questions any time before (or after) Clock-Out by accessing *Visit Details* from the *Schedule* page. Answers can be reviewed and modified during Clock-Out.

Care Insights Questions

When the Patient is enrolled in *Care Insights*, you must answer **Yes**, **No**, or **Skip** to all required *Care Insights* questions (marked with a red asterisk) and save the responses before clocking out. If configured by the Agency, a required **Additional Info** text box may be displayed for an explanation of a response.

Note: If the mobile app is off-line when you clock out, Care Insights questions do not appear. If the mobile app goes off-line while you are answering Care Insights questions, answers cannot be saved and a warning is displayed.

After a Visit is complete, you can view and edit your responses by accessing *Visit Details* from the *Schedule* page up until the time the visit is billed.

My Availability

When enabled by the Agency, you can review your *Availability* preferences.
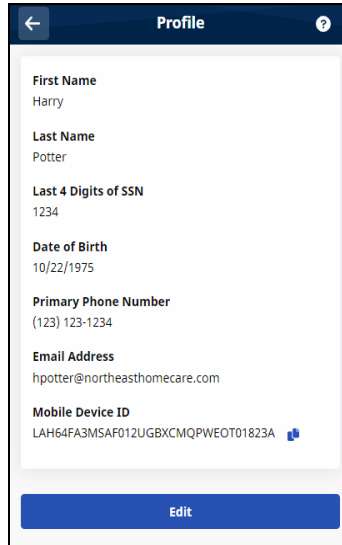
To review Availability, from the *Menu*, tap **My Availability**. The *My Availability* page displays your Regular Availability and Special Availability for the week. A double green checkmark designates preferred times. A single red checkmark designates possible but not preferred times.
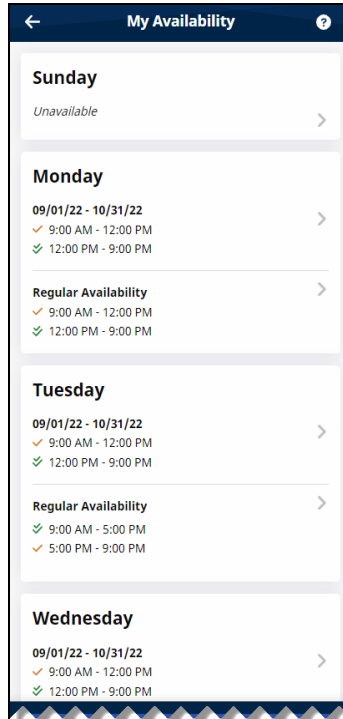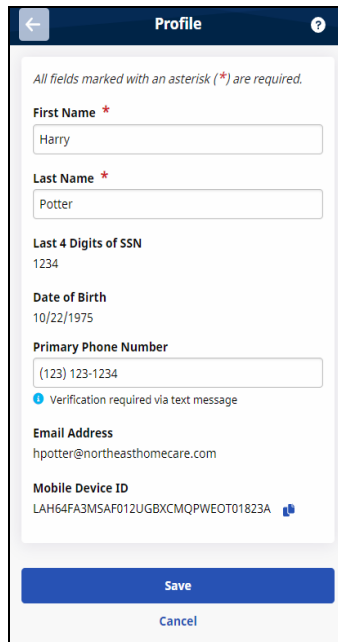

My Availability

Profile

To edit your Profile information, tap **Profile** from the *Settings & Help* section of the *Menu*.

Profile

On the *Profile* page, tap **Edit**, make any changes, and then tap **Save**.
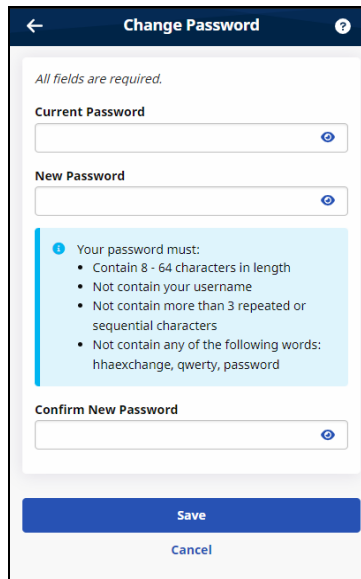
Edit Profile

Note: A confirmation text is sent to your phone when the **Primary Phone Number** is added or changed. You must respond to the confirmation text in order to use the phone number to reset a password.

Change Password

To change your Mobile App password,

1. From the *Menu*, tap ***Change Password***.
2. On the *Change Password* page, type the **Current Password** and **New Password**. Type the new password again in **Confirm New Password**.
3. When finished, tap ***Save*** to change the password and return to the *Menu*.

Change Password

Reset Password

To reset your Mobile App password,

1. From the *Login* page, tap ***Forgot Password?***
2. On the *Forgot Password* page, type the **Email** address associated with the account.
3. Select that you want HHAX to send you a Password Reset Code or that you have an existing active Password Reset Code you haven't used yet. Tap ***Continue***.
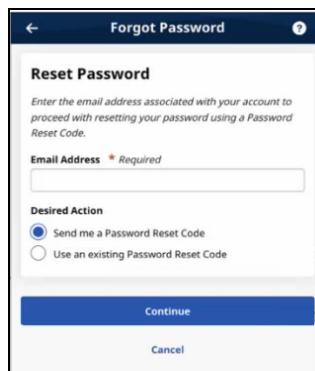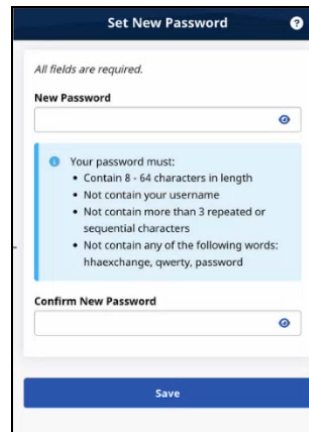
Forgot Password

4. If you requested HHAX to send you a Password Reset Code, check your email account for the HHAX email message containing a unique six-digit numeric code.
5. On the next *Forgot Password* page, when prompted to **Enter Code**, type the six-digit numeric Password Reset Code and tap ***Submit***.
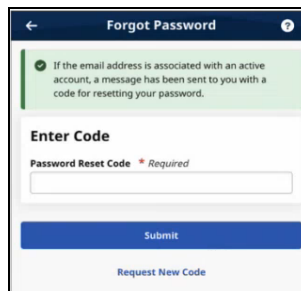
Enter Code

6. When the *Set New Password* page is displayed, type and confirm your new password and tap ***Save***.

Set New Password page

Account Locked

After 10 failed login attempts, you are locked out of the Mobile App. A message advises you to use the **Forgot Password?** function (described above) to reset your password.

Connections

The Connections page is used to switch between Agencies/Offices connected to you, the Care-giver/Employee.
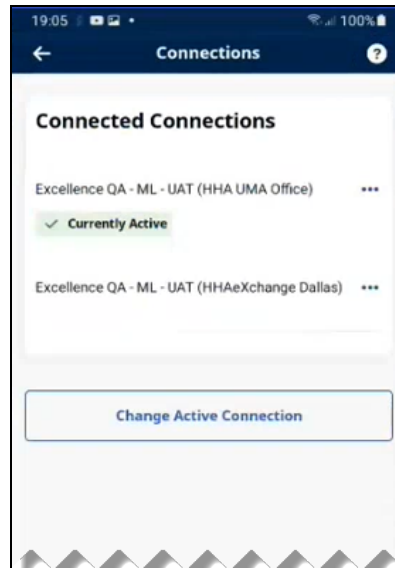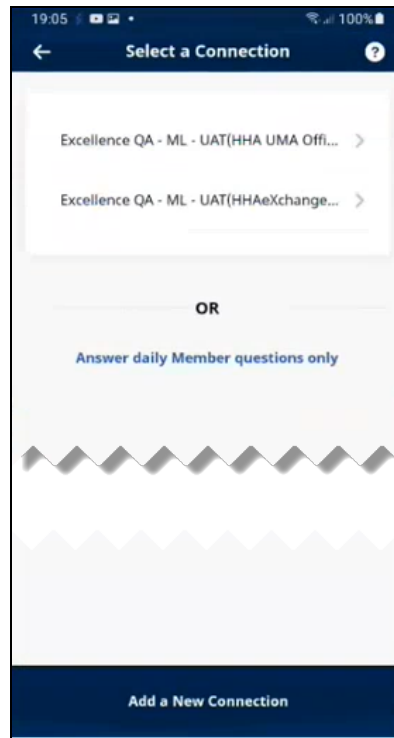

Connections page

To change Connections,
1. From the *Menu*, tap **Connections**.
2. On the *Connections* page, select from the list of **Connected Connections** and tap ***Change Active Connection*** to open the *Select a Connection* page.
3. Select the connection you want or choose to ***Answer daily patient questions only***.

If configured, *Third-Party Terms* must be accepted. Then, the *Schedule* page (*Patients* page for Daily Patient Questions) is displayed.

Select a Connection

If the Connection you want is not shown on the *Connections* page, tap ***Connect with a New Connection***. On the *Connect a New Connection* page, enter the Connection's **Activation Code** and tap ***Submit Code***. Finish Connection Account Setup as explained in the Sign Up Here help topic.

To disconnect a Connection from your account,

1. From the *Menu*, tap **Connections**.
2. On the *Connections* page, tap the ellipsis (**…**) next to the name of the Connection you want to disconnect.
3. Tap **Disconnect Connection from your account**.
4. When prompted to confirm your actions, tap **Disconnect Connection**.
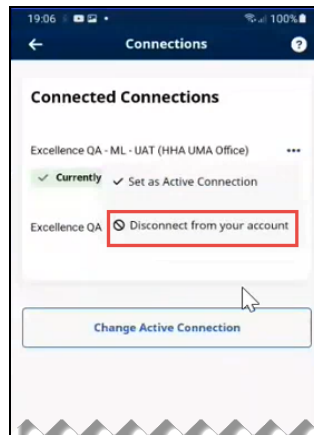
Disconnect Connection

To set a Connection as the active connection for your account,

1. From the *Menu*, tap **Connections**.
2. On the *Connections* page, tap the ellipsis (**…**) next to the name of the Connection you want to set as the active connection.
3. Tap **Set as Active Connection**.
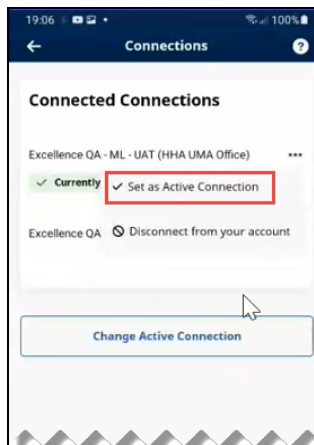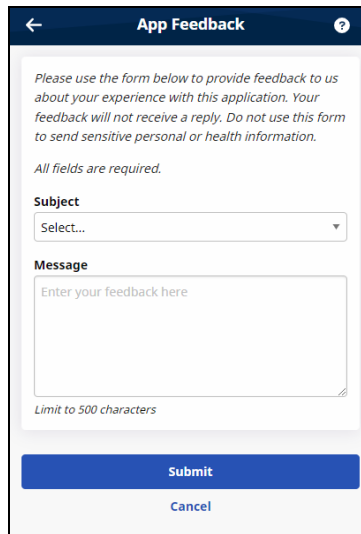
Set as Active Connection

App Feedback

You can use the App Feedback page to provide comments on the Mobile App to HHAX.

To provide feedback,

From the *Menu*, tap ***App Feedback***.

App Feedback

On the *App Feedback* page, select a **Subject** that applies to your comment. In **Message**, type your comments (up to 500 characters) and tap ***Submit***.

Note: Your feedback will not receive a reply.

Caution: *Do not* use this form to send sensitive personal or health information.

Available Subjects include:
- **Functionality Request** - Mobile App enhancement requests
- **General Feedback** - General comments
- **Issue/Bug** - Issues discovered while using the Mobile App
- **Translation Feedback** - Alternate language corrections needed
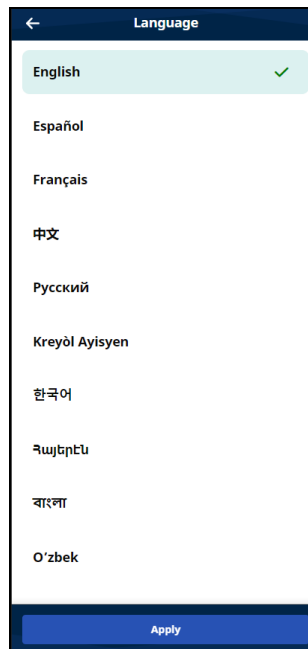

I'm Awake Status

When *Enable the I'm Awake Button for Midnight Shifts* is selected by the Agency in the Enterprise application, Caregivers who work overnight shifts that include midnight (12:00 AM) are presented with an **I'm Awake** button after Clock-In. Tapping the button on a regular basis (designated for you by the Agency) proves to the Agency that you are awake and monitoring the Patient.
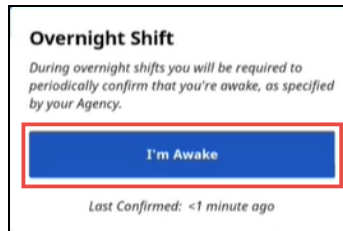

I'm Awake

You must periodically check in by tapping **I'm Awake**.

When you tap *I'm Awake*, the Confirmed time is captured, and a *Last Confirmed* status timer (below the **I'm Awake** button) measures time elapsed since the last time you tapped **I'm Awake**.
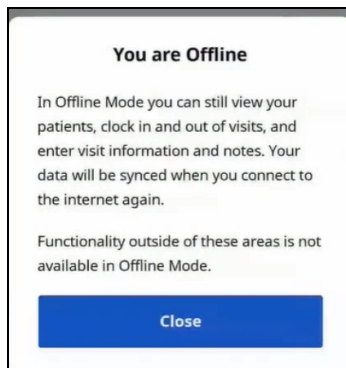
Offline Mode

When *Offline Mode* is enabled by your Agency/Employer, you can use the Mobile App when there is no internet connectivity. When the internet connection is restored, the Mobile App automatically synchronizes with HHAX.

When in Offline Mode, you can Log In with the last used Email and Password, view your existing Patients/Consumers, Start and End Visits/Shifts, and view Help. Unavailable features in the Navigation Bar are marked with a white exclamation mark in a red circle.
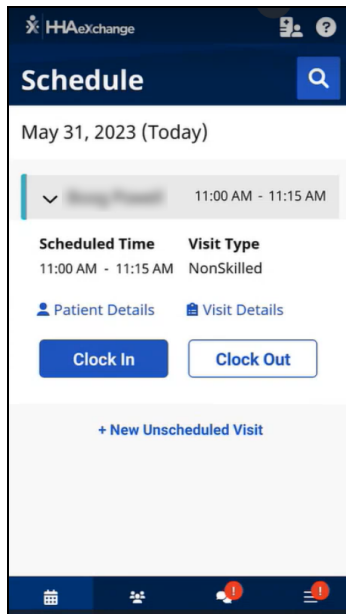
Schedule page in Offline Mode

Selecting a feature or function that is unavailable offline results in a message explaining the limits of offline use.

Offline Message

Agency Configuration

The following Mobile App features and functions are configured by Agency/Office:

- Awake/Alert Status
- Caregiver Compliance
- Community Visits
- Consecutive Shifts
- Daily Variable Visits
- Electronic Visit Verification - GPS or Security Token
- My Availability
- Non-EVV Services
- Offline Functions
- Open Shifts
- Patient Signature Required
- Refused Duty Reason Required
- Skip Patient Signature Allowed
- Third-Party Terms
- Timesheets Required
- Two-Factor Authentication
- Two-Way Mobile Chat - Chat and Topics
- Visit Details - Plan Of Care, Value Based Care, Medications, Notes
- Visit Edit Tolerance Days

If you require one of these features or functions, the Agency must enable it. Contact the Agency for assistance.