

Frequently Asked Questions

The following are a list of Frequently Asked Questions (FAQs) which can be used by HHAExchange (HHAX) System Users. Please note that any inquiry should first verify that the caller is one of the designated Admins of the HHAX system before giving the caller information on contacting HHAX Customer Support directly. Refer to the [Communications section](#) of this guide.

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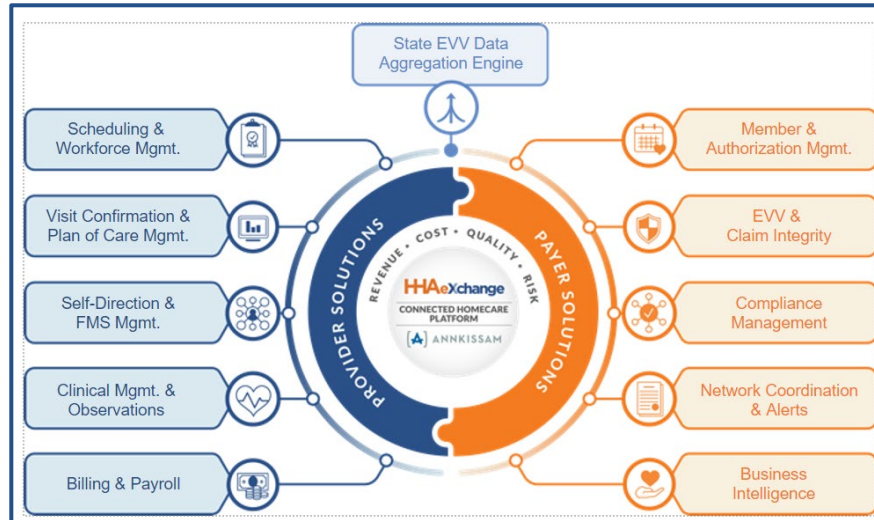
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System

How does HHAX fit in between Providers and Payers?



Do we have to use military time?

Yes, the system is designed to operate on military time and cannot be changed.

What are the system requirements? Is there a preferred web browser?

HHAX is a web-based solution requiring internet connection. The system works best with, Chrome, and Microsoft Edge.

Are all the names and information used in training fictitious?

Yes, a training environment containing fictitious data is used to facilitate demos and webinars.

What types of reports are available in the system? Are they all exportable? What file format are exported reports in?

For Agency Providers, the types of reports range from Member information, visit data, billing, compliance and more. The exportable formats are XML, CSV, PDF, HTML, Excel, TIFF File, and Word.

What if I would like to use other HHAX system features that are not part of the free version?

There is no charge to Providers to access the HHAExchange Free Provider Portal as part of a participating Payer’s network. For additional details regarding other versions of the HHAExchange platform, please visit HHAExchange.com and select [Contact Us](#) to get in touch with our team.

What if I have an existing EVV system I’d like to keep using?

It is simple to connect your existing EVV system to your MCO through the HHAExchange Portal. Ensure to complete the survey for the HHAExchange Integrations Team to coordinate with you to create an interface to process your existing EVV visits and claims. For additional information, please contact EDISupport@hhaexchange.com.

Administration

I need a new User ID. Who should I contact?

Users with the ADMIN Role at your Agency can create New Users in the HHAExchange system. Further instructions are shared upon receiving access to the HHAExchange system. Refer to the [Admin Functions Process Guide](#) for instructions.

I need to deactivate a User. What should I do?

Users with the ADMIN Role at your Agency can deactivate HHAExchange Users in the system. Further instructions are shared upon receiving access to the HHAExchange system. Refer to the [Admin Functions Process Guide](#) for instructions.

What should I do if my password doesn't work?

To troubleshoot common password issues, request the User to check the following:

- Is the Login name entered correctly?
- Is [Caps Lock] selected?

If these troubleshooting tips do not work, then have the Admin reset passwords for other users as follows:

1. Locate the User (**Admin > User Management > User Search**).
2. Edit the User and select **Change Password** on the *Update User Account Page*.

Further instructions are shared upon receiving access to the HHAExchange system.

If I forget my password, will I get locked out after too many attempts?

The system allows up to 4 attempts at login. Thereafter, the user must contact the Agency Administrator (Admin) to unlock or reset their password.

How can I enable or disable permissions?

Only an Admin has the rights to enable/disable permissions for a role. To change permissions, the Admin follows the steps below:

1. Locate the User (**Admin > User Management > Edit Role**).
2. Select the **Section** (and optionally the User's **Role**) for the permission, then click **Search**.
3. Grant or remove individual permissions using the checkboxes and **Save**.

Further instructions are shared upon receiving access to the HHAExchange system.

I enabled or disabled a permission(s), but nothing happened?

If a permission has been changed, the User needs to exit their active session and log in again to the system to see the permission change.

What are the different User Roles in HHAX?

There are several roles to which an Agency system User can be assigned including **Admin**, **Coordinator**, and **Billing**. Each role is equipped to access the corresponding functionalities in the system. Further instructions are shared upon receiving access to the HHAExchange system.

Mobile App System

Does the telephone/call-in option provide directions to the Caregiver/Member in alternative languages. If so, what languages are offered?

Both clock-in methods, IVR (phone) and mobile app, have multiple language options. The free EVV tools may have additional languages available depending on your state or MCO. Please reach out to your specific payer to see which languages are offered.

What devices can the HHAX application be used on? Is it supported by IOS and Android?

The HHAX application is supported on both Android and iOS operating systems.

How is GPS used with Telephony?

The GPS function is only used with the mobile app.

How is GPS used in the community?

Like services used at home, the mobile application captures GPS coordinates only at Clock-In and Clock-Out for services performed in the community.

Member Placement

Are automated emails used to inform Providers of new referrals?

The Agency Admin (Admin) can set up an automated email notification (Common Notifications) for new Placements. The Placement email is for notification purposes only; a User that is logged into the HHAX system can only accept a new Placement.

We wish to remain with our current electronic medical records (EMR) system or Third Party EVV System. How can we connect to the HHAX system to obtain referrals?

Remaining with your EMR system or third party EVV system is not an issue; however, some functionalities, such as Placement Acceptance, Payer Communications, and Billing the Payer, are managed via HHAX. Please sign up for the Portal by completing the enrollment form and selecting the EDI Process as your EVV choice.

Member and Authorization Info

Member is not in the system. What should I do?

Troubleshooting tips:

1. When searching for Member via **Patient > Search Patient**, select *All* from the **Status** filter to ensure Member **Status** has not changed from *Active*.
2. When searching for a Member via **Patient > Search Patient**, select *All* from the **Coordinator** filter to ensure the search returns all Members.
3. If the Member is not loaded to your Provider Portal, then contact your Payer with the Member details for them to ensure the record loads properly

I cannot find a *discharged* Member in the HHAExchange system.

To find a *discharged* Member, navigate to **Patient > Search Patient**. Note that the default value for **Status** is *Active*. To find a *discharged* Member, select *Discharged* from the **Status** filter. This generates Search Results for Members who are no longer *Active*.



Caregiver Management

What is the process for importing Caregivers? Batch import option? What format can they be sent in, excel, PDF, template?

For Provider Agencies, Providers are responsible for entering Caregivers into HHAX. There are two options available to enter Caregivers:

- **Option 1:** Caregivers can be manually entered in the system (**Caregiver > New Caregiver**).
- **Option 2:** For Providers with a high number of Caregivers to enter, use the EDI import option. Additional details are provided on the Provider Information Center page, under the EDI Process tab. Work with our EDI Support team (EDIsupport@hhaexchange.com) to assist with this Excel template.

What does the Caregiver Mobile ID represent?

For Agency Providers, the **Caregiver Mobile ID** is a unique value assigned to the Caregiver. The **Caregiver Mobile ID** is generated once the Caregiver creates their HHAeXchange mobile app account. This Mobile ID must be added to the Caregiver Profile in the Provider Portal.

How are Caregivers trained to use the system?

Provider Agencies are responsible for training their Caregivers. Information for Provider Agencies on training Caregivers is covered during Provider training. Provider Agencies have access to job aids and resources to train their Caregivers on how to use EVV for clocking in and out and reviewing schedules.

EVV Functions and Setup

What is the most common way to verify EVV?

The method of EVV varies from Agency to Agency. As part of the free EVV tools, HHAeXchange offers Providers two methods: **Mobile App** and **Telephony (IVR)**. These two methods are used for Caregivers and Members to verify EVV.

What are the flexible scheduling options within the system?

Providers can schedule visits as needed, create a recurring schedule (Master Week), or use scheduling tools such as **Copy and Paste** or **Copy and Create**.

Whose phone should be used when using telephony? Can it be a cell phone or a landline?

If the Caregiver uses the Telephony method to verify EVV, then they must use the Member's phone to confirm using a landline.

EVV Issues

Does the EVV GPS monitor a Caregiver even when not working? Will GPS be tracked even when not using the mobile app?

No, GPS is only used at the time of Clock-In and Clock-Out.

How are services verified when there is no cell service or internet service?

There is an Offline Mode, for cases when the service is not available for the mobile app. Once services are reconnected, the information syncs into the application.

How are missed visits and visit edits resolved within the HHAX system?

For Providers, **Missed** visits only apply when a schedule is pre-defined. The **Reason** and **Action Taken** fields are required when marking a visit as **Missed**. The **Reason** and **Action Taken** dropdown fields must also be selected when editing a visit.

How do I create a permanent schedule for the future?

If you are using the HHAX EVV, you can create a *Master Week* as a template for your weekly scheduled visits within the Provider Portal. Refer to the [Scheduling Process Guide](#) for instructions.

EVV Exceptions

Can telephony be used in the community from a cell phone?

Because EVV requires location to be verified, the number used for telephony must be a landline connected with the Member's address in their EVV system profile.

The Caregiver Clocked OUT instead of clocking IN. Can this be corrected?

If the Caregiver accidentally Clocked IN and OUT (or vice versa), this can be corrected as listed below:

1. Navigate to **Visit > Call Dashboard > Call Maintenance**.
2. Search for the call using the status *Potential In/Out Mistake*.
3. When the call is located, click the desired link (Out or In) in the **Call Type** field.
4. Click the **OK** button to confirm the action.

Can I link a call that was previously rejected?

Calls that have been **Rejected** can no longer be linked to a scheduled visit. When rejecting a call, be sure that it cannot be linked to a visit.

I fixed a call exception and I still see the same call on the Call Maintenance page. What should I do?

If a fixed Call Exception does not clear, then click on the **Search** button to refresh the Call Maintenance page. The exception should no longer be listed once corrected.

How soon are newly added Phone Numbers (Phone 2 and/or Phone 3) available on a Member's Profile?

A newly added number is saved immediately in the Member's Profile and available for use in any subsequent calls. However, calls in the Call Dashboard require overnight reprocessing to link to the visits.

Many residents are moving away from landlines. Can the phone number entered be a cell phone number?

The phone number should be associated with a landline. Use the Mobile App GPS if a landline is not available.

How can I fix the calendar when a shift is covered by a different Caregiver?

If you have TWO Caregivers rendering services, you can create TWO different shifts on the same day directly in the calendar. If the shift was covered by another worker, and the calls did not automatically link, then fix via the **Call Dashboard** by updating the scheduled Caregiver.

Communications

HHaExchange Contact Information

Live Chat is recommended for existing Providers with a Portal. If you are using a third party EVV system and not HHAX, then use the following phone and email options:

- Phone: 855.400.4429
- Email: support@hhaexchange.com

HHaExchange End User Inquiry Contact

Agency Admin



- Username or Password Inquiry
- How to search/view information in the HHAX system (for example: Placements, Authorizations, Member, etc.)
- Rate for Member is incorrect

HHAX Customer Support



- Upcoming implementation information
- Cannot locate EDI Visit or Billing files in the system
- System not functioning as expected (for example: system slowness, page not appearing, etc.)
- Cannot clear Visit from Pre-billing

Payer (via HHAX Note Function)



- EVV Implementation and or EVV policy information
- Inquiry regarding a specific Member
- Inquiry regarding Payer contract

Will the HHAX Support Desk be available 24 hours? Is it only by email?

The HHAX Support Desk operates from **7:30 a.m. -7:30 p.m. EST, Monday-Friday**. Email is the preferred method at support@hhaexchange.com. Live Chat is recommended for existing Providers with a Portal. If you are using a third party EVV system and not HHAX, then use the phone and email options.

Will all Notes always be available in your system?

Yes, all Notes are archived in the system. Further instructions are shared upon receiving access to the HHAeXchange system.

Seems the EDI doesn't cover items such as Notes (Member and Payer Communications). Is there an exception when a Provider needs to log in to send notes to Payer?

Agencies using EDI must still connect via HHAX to send/receive Notes from the Payers.

Will we be able to communicate with staff through the system via email or text message?

Use the system to enter any related notes to Members or in general. Email and text messages are not recorded in the system.

What types of documents can be attached in Notes? (PDF, Excel, CSV, etc.)?

The system supports the attachment of common files to include PDF, Word, Excel, and CSV among others.

Will the system "alert" us via email when there is a referral or notes? How would Providers be alerted when not currently logged in to the HHAX system (during non-business hours)?

Common Notifications can be activated by the Payer to include Placement alerts via email. Alerts are intended for awareness purposes only and can be enabled through **Admin > Office Setup**. Users must login to the system to perform needed steps (e.g., reviewing and accepting a Member Placement).

EDI/Import

Will Providers who use a third party EVV system also need login to the HHAX Portal?

Providers using their own EVV system are not required to login into their HHAX Portal. However, as best practice, we suggest Providers review the data in their Portal, as they are responsible for ensuring that all visit data is accepted into the HHAX aggregator. Providers may need to log into their HHAX Portal to review communications, resolve any prebilling or billing errors as well as check claim status.

If a Provider uses 2 different systems for business purposes, can data from both systems be integrated effectively into the aggregator?

The HHAX EDI Team (EDIsupport@hhaexchange.com) will assist with integrating EVV compliant systems to the HHAX aggregator.

Can a Provider choose to use HHAX EVV first then transition to a third party EVV vendor?

Yes, Providers can switch from one EVV system to another. Please contact the HHAX EDI Team (EDIsupport@hhaexchange.com) as the first step to start the integration process.

Do EDI Users ever use HHAX System for Prebilling? When is the EDI file compared to the HHAX system? Where do Users see alerts and warnings against HHAX data?

EDI Providers receive a file with all Prebilling Exceptions for each billing file sent to HHAX. From this file, Providers can fix the Prebilling issues in their system.

Claim Status

Can I check my claims before submitting them?

Yes. The HHAeXchange Portal provides a Prebilling Claims Scrubbing module designed to ensure that your claims are compliant with the authorization and your MCO contract.

How are claims submitted through HHAX?

Claims are submitted to your specific MCO or Payer by completing some necessary steps in the HHAeXchange Portal. You must go through prebilling, invoicing and batching those claims which are sent to your MCO on your behalf. Refer to the [Billing Process Guide](#) for additional instructions on the HHAX billing and claims submission process.

How do I check my claim status?

In your HHAeXchange Portal, you can run a report with the claim status which can be exported in a variety of different methods. To view Claim Status in the Portal, navigate to **Reports-> Billing-> Claim Status Report**.