

# **HAeXchange**Caregiver Mobile App Process Guide Caregiver Setup and Use

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# **Mobile App Caregiver**

#### **Overview**

The **HHAX Caregiver Mobile App** is a tool used to place Electronic Visit Verifications (EVVs), review Patient and Visit information, manage Availability, and express interest in open shifts. The Caregiver Mobile App is available for both iPhone and Android users. This category covers the Caregiver Mobile App functionality and setup on the Caregiver's device.

Please direct any questions regarding the content of this document to <u>HHAeXchange Client Support</u>. Refer to the **Help** section in the Caregiver Mobile App for immediate questions or click the link to contact support for further assistance.

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

## Accessibility

The HHAX 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**

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

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



# **Getting Started**

#### **Downloading the App**

The HHAeXchange Caregiver Mobile App is available for download through the App Store or Google Play for either iPhone or Android devices. To locate and download the App, enter the keyword **HHA Exchange** in the search bar of the App Store or Google Play (as shown).

Caregivers are responsible for downloading and installing the application on their personal mobile device. After registering, Caregivers must provide credentials and ID numbers to the Agency for further setup and linking to the HHAX platform.



HHAeXchange Mobile App

When the Caregiver Mobile App is first installed, the user is prompted to select a preferred language. The language selected for the signup process is also the language in which guidance and emails are presented.





Select Language (Spanish)

4:32 🖬 🕶 🕲 • 🛞 all 🏚
Soluciones de gestión basadas en web en tiempo real para agencias de atención domiciliaria y pagadores.
Email
Contraseña
Olvidó la Contraseña?
Salvar ID Usuario № 🔴
Iniciar sesión
D del dispostivo móvil: 87FDDE84DB1E Versión: 20.10.1
Registrarse Centro de Ayuda

**Creating Credentials (Spanish)** 



4:32 🖬 🕈	• Q •			Sal 🕯
anular	R	egistrarse	(	Registrarse
Email	Email			
Nueva Contraseña	Nueva	Contraseña		0
Confirmar contraseña	Confirr	nar contraseña	3	
				_
	111	0	<	

Registration (Spanish)

## Signing Up and Registering

Creating an account for the Caregiver Mobile App is a two-step process, as follows:

- 1. Sign up by creating login credentials.
- 2. Register by entering additional demographic information.

#### Sign Up

After the App has downloaded, press **Sign Up** on the bottom left of the main screen. The App prompts for the following:

- An Email Address
- A **Password** (minimum of 8 letters, 1 capital, and 1 numeric value)

When credentials are completed and confirmed, select **Sign Up** to log in to the App.



5:12 Sprint	<b>N</b> ] 4	® ⊕ ⊿l 97%∎
Cancel	Sign Up	Sign Up
Email	Email	
Password	Password	0
Confirm Password	Confirm Password	
111	0	<
_		

Sign Up Screen

Upon successfully creating an account, the system issues a verification email:

Subject: Sign-up Successful
Registration SuccessfulWelcome! Thank you for signing up with the HHAeXchange Mobile Platform.
Getting Started is easy!
<ol> <li>Open your HHAeXchange Mobile App.</li> <li>Sign-In with the Username &amp; Password that you entered during sign-up.</li> <li>Click on the icon on the top right-hand corner of the screen and select "Update Profile" to complete your profile and link to your agency.</li> </ol>
Thanks, HHAeXchange
* HAexchange

Successful Sign Up Email

#### Register

Follow the steps outlined below to register on the HHAX Caregiver Mobile App.

Step	Action
1	Log in to the App after receiving the verification email.
2	Review the Terms of User Agreement and tap Agree.
3	When the Main Screen opens, click the <b>three-dot icon</b> (at top right) as prompted by the message, and tap <b>Update Profile</b> .



## The Enterprise System

Step	Action
	5:17 Sprint ¥≹ रू ⊕ 96% ∎
	* HHAeXchange
	Click the : icon to the right to update your profile and become linked to your agency
	5:18 Sprint ¥। ॡ छ ⊿ 196% ∎
	Clickth Update Profile
	Mobile ID (Unavailable) Mobile Device ID: AB203BBF3D0
	The ID number of this specific mobile device Change Password
	Privacy Policy
	User Agreement
	End User License Agreement
	Logout
	Version: 21.09.01
	© 2021 HHAeXchange
	Complete all the fields on the <i>Create Profile</i> page. Tap <i>Create</i> to create the Profile.
	Note: Values must match the information on record with HHAX. The Mobile App does not link correctly if
	any of these values do not match.
	5:19 Sprint ♥i ♥ ⊕ .al 95% ■
	Cancel Create Profile Create
	First Name First Name
4	Last Name Last Name
	Last 4 SSN Last 4 SSN 🕜
	Gender Gender
	Birthday MM/DD/YYYY
	Email     gofos35304@tinilalo.com       Phone     (xxx) xxxxxxxxx
5	When all the information is entered correctly, a message appears containing the <b>Mobile ID</b> .



tep Action
5:21 Sprint Ni ♥ 등 세 95% ■
Cancel Create Profile Create
First Name John
Last Name Smith
Last 4 SSN 9802
Gender Male
Birthday 09/13/1973
You have been registered successfully. Your Mobile ID Number is 1629416 ind a copy has been emailed to you. This number should be provided to your agency in criter to be linked with them
ОК

HHAX sends a second email after successful registration. This message contains the **Mobile ID** as well as instructions on how to log in and use the Caregiver Mobile App:

Subject:	Registration Successful
Registrat	ion Successful
Dear Joh	n Smith
Your HH/	AeXchange Mobile App has been registered!
Complete	these final step to link to your agency and start using the app!
1. Pro	ovide your unique Mobile ID #: 1629416 to your Agency
2. Op	en the HHAeXchange Mobile App.
3. Sig	n-In with the Username & Password that you entered during sign-up.
	ce your agency activates your Mobile App profile in their systems, you will see Patient and Visit ormation in your Mobile App!
Note: If y each of t	ou work for more than one Agency using HHAeXchange, you can provide the same Mobile ID to hem.
Thanks!	
HHAeXch	nange
* H	Aexchange

Successful Registration Email



#### **Mobile Biometric Login**

A user can log in with Fingerprint Authentication or Facial Recognition (when the capability is available on the mobile device).

For the Biometric Login option to become available, the user must have logged in to the Agency using **Email** and **Password** and logged out at least one time.

When the Biometric Login option is available, the fingerprint icon at the right of the **Password** field is displayed as enabled.

Rea Ma	HAexa al Time Web-Ba nagement Solu re Agencies & F	ased utions for Ho	
_		.com	•
Password		- Mar-	۵
Forgot Passw	vord?		
Save User	ID: Yes 🧲		
	Log In		
			4.0
Nobile Device	ID: AB203 \	/ersion: 22.0	14.0

Biometric Login Available

After typing the login **Email** address, the user taps the fingerprint icon to access the device's fingerprint authentication or facial recognition biometric page.

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





Sample biometric page

After providing a matching fingerprint or facial scan, the user is allowed access to the Caregiver Mobile App.

**Note:** If the user changes their password or uses the **Forgot Password?** function, the Biometric Login option is reset. The user must log in to the Agency using **Email** and **Password** and log out at least one time before the Biometric Login option becomes available again.





#### **Mobile Biometric Two-Factor Authentication**

Mobile App Biometric Two-Factor Authentication (2FA) allows Agencies to add another layer of security to the login process on the Mobile App.

On the Mobile App, Caregivers are prompted to authenticate their login via the biometric measures configured by the Agency. The Biometric options currently supported are facial and fingerprint recognition (if available on the mobile device).

#### **Facial Recognition**

When facial recognition is required for authentication, the image below is displayed.

<b>Biometric Authentication</b>			
Choose a method to verify your identity			
At least one of the agencies you are linked with requires two factor authentication. Please use one of the methods from the list below to authenticate.			
Use facial recognition			

**Facial Recognition Required** 

When confirmed, the app reports a successful facial recognition and logs the user in.



If facial recognition is not successful, the app prompts the user to retry.





**Face Not Recognized** 

#### **Fingerprint Recognition**

When fingerprint recognition is required for authentication, the initial screen prompts the user to press on the **Use your Fingerprint** box.



**Fingerprint Recognition Required** 

The next screen prompts the user to perform the **Touch ID for HHAeXchange**, using the applicable device feature.







Use Touch ID to Authenticate

If the authentication cannot be verified, the device prompts the user to retry the fingerprint authentication.



**Retry Authentication** 



#### **Biometric Authentication Not Configured/Supported**

If the device is either not configured or does not support fingerprint or facial recognition, the screen prompts the user to act.



**Device Not Configured/Supported** 

Tap *Settings* to configure the feature or tap *Exit* and contact the Agency for further instructions.



#### **Privacy & Confidentiality Acknowledgment**

This setting can be adjusted by HHAX System Administration. Contact the <u>HHAX Support Team</u> for assistance.

Some mobile users may be required to acknowledge a *Privacy and Confidentiality* statement before accessing the system. If a Privacy and Confidentiality Notice is displayed when logging in, tap *Continue* to acknowledge it and access the system.

Important Notification				
Al Statement				
This is a government system for AUTHORIZED OFFICIAL USE ONLY.Unauthorized access, use, misuse, or modification of this computer systemor of the data contained herein or in transit to/from this system constitutesa violation of Title 18, USC Section 1030, and may subject the individual toCriminal and Civil penalties pursuant to Title 26, USC, Sections 7213, 7213A(the Taxpayer Browsing Protection Act), and 7431 in addition to possible otherfederal and state of Alabama criminal and civil penalties. This system andequipment is subject to monitoring to ensure proper performance of applicable security features or procedures. Such monitoring may result in theacquisition, recording and analysis of all data being communicated, transmitted, processed or stored in this system by a user. If monitoring reveals possibleevidence of criminal activity, such evidence may be provided to LawEnforcement Personnel.ANYONE USING THIS SYSTEM EXPRESSLY CONSENTS TO SUCH MONITORING.Reference Medicaid Security Policy PL-4: Rules of Behavior, for additional information				
By continuing, I confirm that I have read the Important Notification				
Continue				

Sample of a Privacy & Confidentiality Notice



# **Navigating the Mobile App**

#### The Main Screen

Using the Mobile App, Caregivers keep track of their schedule, receive and respond to messages from their Office/Agency, and Clock In and Out of a Visit.



The Main Screen

The following sections provide descriptions and guidance on the Main Screen options.

## **Top Panel**

Tap the icon on the top panel to switch between Agencies/Offices the Caregiver is connected to. The Caregiver must provide every Agency/Office the **Mobile ID** for proper syncing/linking with the system.



#### Switch Offices

#### **Today's Schedule**

Today's Schedule is used to review and Clock In and Out of scheduled Visits for the present day.





**Today's Schedule** 

#### **Unscheduled Visits**

**Unscheduled Visits** allows Caregivers to submit EVV for unscheduled Visits. Caregivers create an unscheduled visit for any Patient to whom they have access by selecting the Patient Profile.

If asked to provide service for a Patient the Caregiver has never worked with before, the Caregiver selects *Patient not in the list* to create a new visit

EVV for an Unscheduled Visit generated via the **Patient not in the list** selection is automatically sent to **Call Maintenance** with the status "Unscheduled – Patient not Selected." EVV cannot be linked because EVV is meant to provide proof to the Agency/Office that Caregivers were with the Patient.



Create Unscheduled Visits

Note: Placing EVV and logging POCs for Unscheduled Visits follows the same process as Scheduled Visits.

#### Warning for Inadvertent Unscheduled Visits

When attempting to create an *Unscheduled Visit* that matches a visit already on **Today's Schedule**, the Caregiver is given the option to resume an active Visit for the Patient in *Today's Schedule* or to continue to create a new Unscheduled Visit.



If the Caregiver taps **RESUME**, *Today's Schedule* is displayed to use an active Visit for the selected Patient.

If the Caregiver taps **CONTINUE**, Visit Detail is displayed to create a new Unscheduled Visit.

Unschedu	uled Visit	Q (2)
1		
3223,		
01 basePatien	175201	
GTON, DC, 2000	15,	
6May20 BaseTe	estPat_06May20	
PUNE, PUNE, A	K, 96232,	
03 childpatien	175203	
(, NY, 10008,		
ient		
0001,		
t, Saajan Apartm	ent, Ahmedabad, TN	, 38001,
	1 3223. 01 basePatien AGTON, DC, 2000 5May20 BaseTr PUNE, PUNE, AI 03 childpatien 5, NY, 10008, 5 5 6 6 6 7 7 8 8 8 9 9 9 1, 10 9 9 9 1, 10 10 10 10 10 10 10 10 10 10 10 10 10 1	1 3223. 01 basePatient75201 NGTON, DC, 20005, 5May20 BaseTestPat_06May20 . PUNE, PUNE, AK, 96232, 03 childpatient75203 ., NY, 10008, ient

Scheduled Visit/Unscheduled Visit Option

#### **Patient Signature Requirements for Unscheduled Visit**

If any active contract for a Patient requires Patient Signature at Clock-In or Clock-Out (as configured), the Patient Signature screens are presented on the Mobile App (include Unscheduled Visits). If applicable, the *Skip* button appears on the screen (if configured). The following images illustrate the sequence of screens.



#### The Enterprise System



Clock IN/OUT



**Patient Signature** 

9:56 Sprint	¥ଶିହ ବିଶିଯା 100% ଯି		
<b>K</b> Back	Visit Del Barbara Ta		?€
Skip Reaso	ns		
Patient Refu	ised		0
Patient Unal	ble to Sign		0
Cance			
Canci	el	Save	
	0	<	

Skip Reason (if Skipped)



#### The Enterprise System

8:10 Sprint	8:10 Sprint 🛛 💐 🕈 🕾 🗐 📶 28% 🛢			
Dack	Visit Detail John Smith			
c	Clock In/Out	Directions		
09/23 at <b>10:00PM</b>	09/23	at 10:15PM		
Clock In		Clock Out		
Confirmed: 08:08PM 🗸 Confirmed: 08:09PM 🗸				
- Plan of Care Tasks				
No Plan of Care (POC) task associated with this visit				
You have been successfully Clocked Out.				
ОК				
^- B^TH 'N SHOV'ER				

#### **Confirmation Times**

#### Select Service Code for an Unscheduled Visit

When the Office has enabled the **Enable Unscheduled Visit Service Code Selection** option, if an Unscheduled Visit is conducted and multiple Service Codes are available in the Member's Active Authorizations, the Caregiver is prompted to select the visit's Service Code on *Clock In*.

From the Visit Detail screen, select the applicable **Service Code**.

<b>K</b> Back	Visit Detail 18 jan 18 jan	?		
	Clock In/Out	Directions		
Service Code	* Required			
Select a Serv	rice Code	-		
Select a Serv	Select a Service Code			
HHA GUIId N	HHA GUild Non skilled			
HHA Visit				
	are (POC) task associated			
if this	s is in error contact your ag	leucy		

Selecting a Service Code for an Unscheduled Visit

Page 20



If only one Service Code is available in the Member's Active Authorizations, that Service Code is automatically selected and displayed at *Clock In*.



**Only One Service Code Available** 

On *Clock Out*, the Caregiver can change the visit's Service Code if another Code is available.

<b>K</b> Back	Visit Detail 18 jan 18 jan	0
	Clock In/Out	Directions
Service Code	Required	-
HHA GUIId Non	n skilled	
Clock	In	Clock Out
Confirmed: 08:48PM		

**Changing Service Code on Clock Out** 



#### Plan of Care Tasks Displayed for Unscheduled Visits

*Plan of Care* tasks are displayed when an Unscheduled Visit is created for a Patient who has one active Authorization with POC Tasks.



POC Tasks Displayed for Unscheduled Visit

If no *Plan of Care* tasks exist for the Patient, or if *more than one* active Authorization with POC Tasks exists for the Patient, the **Plan of Care Tasks** section indicates that no POC Tasks are associated with the Unscheduled Visit.



#### Visits

Select Visits to review all scheduled Visits up to two weeks in advance.



**Completed and Scheduled Visits** 

#### **Patients**

Select *Patients* to view a list of all Patients the Caregiver can access. Select a Patient to view Patient Info and Visits.

10:42 Sprint	×	奈 😳 💷 39% 🛢		
Keack Patient Detail ⑦				
	Patient Info	Visits		
	Greg Baker			
National Home C	are LLC (National	Home Care LLC)		
Phone 1	718-414-6156			
Phone 2				
Phone 3				
Address 1	297 W 110th St, J YORK, NY, 10026			
Emergency Contacts				
Drake McBride "	Brother"			
Phone 1	212-333-3344			
Phone 2				
Address	50 West 29th Str	eet		
Lives With Patient	No			
Has Keys	No			

#### **Patient Details: Info**

If authorized, Caregivers may also access the Patient's **Clinical** info and **Medications**.



10:35 Spri	nt 🌂 🛇 🕾 🗐 💵 41% 🖹			
<b>K</b> Back	Patient Detail ⑦			
Clinical	Medications			
Aspirin/Codeine				
Dose	500 Milligram			
Route	Oral			
Frequenc y	Every 6-8 Hours			
Comment				

**Patient Details: Medications** 

Multiple Addresses appear on the *Patient Info* tab (as shown) if entered in the Patient Profile page.

10:57 Sprint	atient Detai	। । । । । । । । । । । । । । । । । । ।		
	Patient Info	Visits		
Greg Baker National Home Care LLC (National Home Care LLC)				
Phone 1	718-414-6156			
Phone 2	718-474-0000			
Phone 3 718-878-9999				
Address 1 297 W 110th St, Apt 25, NEW YORK, NY, 10026				
Address 2 297 W 130th St, NEW YORK, NY, 10026		NEW YORK, NY,		
Address 3	100 W 99th St, A YORK, NY, 1002			
Finer hor Connet				

**Patient Multi-Address** 

#### The Enterprise System



#### Messages

Select **Messages** to review and respond to any messages sent from the Agency/Office. Follow the steps below to create, send, and filter messages on the Mobile App.

Step	Action				
	Tap the notepad icon (as shown) to enter a new message or respond to an existing one.				
1	12:14 Sprint       ▲ ⑦ ඞ 1 25% ■         ▲ Back       Messages       ⑦ ✔ ☑         Andrew Tate       07/24 07:47 AM         → Agency Message       07/24 07:47 AM         → Agency Message       sending you a message - Sent by HHAeXchange         raviraj solanki       05/27 06:24 AM         → Agency Message       Permanent Shift Starting 10/01/2018 Declined         HH AeXchange COVIP-19       02/25 06:45 AM				
2	When the Message window opens, tap the <b>plus</b> icon to select a recipient (To) and Priority. Compose the message in the text area. Tap <b>Send</b> to send the message. $\underbrace{12:22 \text{ Sprint}}_{\text{Cancel New Message Send}}_{\text{To: Timesheet}} \\ \underbrace{\text{Subject: Agency Message}}_{\text{Enter the message text here.}} \\ \underbrace{\text{Friority: Low}}_{\text{Enter the message text here.}} \\ \underbrace{\text{Subject: Agency Message text here.}}_{\text{Enter the message text here.}} \\ \underbrace{\text{Subject: Agency Message text here.}}_{\text{Enter the message text here.}} \\ \underbrace{\text{Subject: Agency Message text here.}}_{\text{Enter the message text here.}} \\ \underbrace{\text{Subject: Agency Message text here.}}_{\text{Enter the message text here.}} \\ \underbrace{\text{Subject: Agency Message text here.}}_{\text{Enter the message text here.}} \\ \underbrace{\text{Subject: Agency Message text here.}}_{\text{Enter the message text here.}} \\ \underbrace{\text{Subject: Agency Message text here.}}_{\text{Enter the message text here.}} \\ \underbrace{\text{Subject: Agency Message text here.}}_{\text{Enter the message text here.}} \\ \underbrace{\text{Subject: Agency Message text here.}}_{\text{Enter the message text here.}} \\ \underbrace{\text{Subject: Agency Message text here.}}_{\text{Enter the message text here.}} \\ \underbrace{\text{Subject: Agency Message text here.}}_{\text{Enter the message text here.}} \\ \underbrace{\text{Subject: Agency Message text here.}}_{\text{Enter the message text here.}} \\ \underbrace{\text{Subject: Agency Message text here.}}_{\text{Enter the message text here.}} \\ \underbrace{\text{Subject: Agency Message text here.}}_{\text{Enter the message text here.}} \\ \underbrace{\text{Subject: Agency Message text here.}}_{\text{Enter the message text here.}}_{\text{Enter the message text here.}} \\ \underbrace{\text{Subject: Agency Message text here.}}_{\text{Enter text here.}}$				
3	To sort existing messages, tap the <i>filter</i> icon as shown in the <b>Sort Messages</b> image.				



#### **Archiving messages**

You can archive messages, so they are retained in history but hidden from the user's view.

To archive a message, press and hold the message until the app asks you to confirm archiving the message.

Are you sure you this mes	
No	Yes

Archive prompt

Tap *Yes*, and the message is archived and hidden from view.

To review archived messages, change the *Messages* filter to include *Archived Messages* or *Both* Messages and Archived Messages.

6:24 🐝 🖲 🕄		ଦ୍ଧେ 🖏 🖏 📶 32% 🛔
<b>K</b> Back	Messages	0 T 🗹
All	Tab to refres	
Unread		DAUNT DO AN AN
Received		<b>~</b>
Sent		114107.02.10 MM
Apply filter to:		
O Mess	ages	
O Archi	ved Messages	
O Both	inge	
	Search	

**Messages Filter** 



#### **Open Shifts**

The user can select **Open Shifts** to review and request open shifts as broadcast by the Agency/Office.

1:11 Sprir	nt 💐 🤶	🔌 🗢 🕀 📶 53% 🕹	
<b>K</b> Back	Open Shifts	ଡ଼♥₽	
NEW	PENDING		
09/25/20	N BEACH, FL 33437-1638 )21 <b>I - 04:00 PM</b>	✓ ×	
09/24/20	N BEACH, FL 33437-1638 )21 <b>1 - 12:00 PM</b>	✓ ×	
09/23/20	N BEACH, FL 33437-1638 )21 <b>1 - 10:00 AM</b>	✓ ×	
Open Shifts			





## **My Availability**

The **My Availability** function allows Caregivers to review and adjust their availability preferences, provided that the Office/Agency has enabled this feature.

7:18 Sprint	🗟 🕾 🗑 🗐
KBack My Ava	ailability 🕀
Regular Availability	Special Availability
Availability 1	Clear This Week
Saturday	
Sunday 🐱	LIVE IN
Monday 觉	LIVE IN and 0900 - 1200
Tuesday ?	LIVE IN
Wednesday 觉	0900 - 1200
Thursday 觉	LIVE IN and 2300 - 2300
Friday 🐱	0900 - 2100

#### My Availability

To edit Availability, select the day to edit or tap *Clear This Week*. Select the *Special Availability* tab at the top of the page to set an alternate availability schedule.

7:23 Sprint	হু 😇 💷 100% 🗎
<b>K</b> Back Sun	day
What hours can you work	on Sunday?
I can work from:	until:
Is this when you Prefer to work? Or will you just Might Work at this time?	
Prefer	Might Work
Will you work a Live-In on Sunday? If yes, click below	
Save	Clear my Selections

#### **Edit Regular Availability**



# **Request Open Shifts**

Select **Open Shifts** to review and request open shifts as broadcast (sometimes called *case broadcasting*) by the Agency/Office. Follow the steps below to view and express interest in Open Shifts.

Step	Action	
	The <b>Open Shifts</b> screen appears displaying all broadcast shifts on the <b>New</b> tab. Shifts are labeled	
	as Single or Permanent.	
	1:11 Sprint K ♥ ⊕ # 53% # <b>✓Back Open Shifts ⑦ ▼ ♪</b>	
	NEW PENDING	
1	BOYNTON BEACH, FL 33437-1638 09/25/2021 03:00 PM - 04:00 PM Single	
	BOYNTON BEACH, FL 33437-1638 09/24/2021 11:00 AM - 12:00 PM Single	
	BOYNTON BEACH, FL 33437-1638 09/23/2021 09:00 AM - 10:00 AM Single	
	After tapping the line item, the <b>Details</b> tab opens, providing basic information.	
	<ul> <li>Tap <i>Interested</i> (to express interest in working the shift) or <i>Not Interested</i> (to reject and remove from the list) after evaluating the shift.</li> <li>Tap the <i>Map</i> tab to access the Google Map visual. Refer to the <u>Open Shifts Map Scaled to Patient</u> <u>Address</u> section below.</li> <li><i>Note:</i> As per HIPAA regulations, only the City, State, and Zip Code can be provided at the time of broadcast. When assigned, the Caregiver can view the complete Patient address.</li> </ul>	
	1:14 Sprint 💐 🗢 🗟 🖬 55% 💩	
2	KBack Open Shifts ⑦	
	DETAILS MAP	
	Type Single	
	Discipline PCA Address BOYNTON BEACH, FL 33437-1638	
	Shift Date 09/25/2021	
	Shift Time 03:00 PM - 04:00 PM Note Please consider this shift.	
	✓ Interested × Not Interested	



Step	Action	
	Requested shifts move to the <b>Pending</b> tab, pending assignment from the Agency's Coordinator.	
	1:18 Sprint ¥. ♥⊖# 57%å	
3		
	NEW PENDING	
	BOYNTON BEACH, FL 33437-1638 09/23/2021 09:00 AM - 10:00 AM Single	
	MELROSE, NY 12121-3213 start 10/01/2018 SN, M, T, W, TH, F, S : 12:00 AM - 01:00 AM	
	BROOKLYN, NY 11213 start 11/21/2016 X SN, M, S : 08:00 AM - 10:00 AM Permanent	
4	When a shift is assigned to the Caregiver, the shift moves from the <b>Pending</b> tab to the Caregiver's <b>Visits</b> section. The Caregiver is alerted of the assignment.	
	When the Agency <u>rejects</u> the request, the shift is removed from the <b>Pending</b> tab, and a message is sent to the Caregiver with the rejection reason (such as "Shift no longer available").	
	6:33 Sprint NI ♥ 3 41 79% ■ *③ National Home Care LLC)	
	Click here for your required training, powered by Nevvon Go	
	Schedule Today's Schedule Visits scheduled for 09/21/2021	
	Unscheduled Visit Visits not scheduled on Calendar	
	Visits List of scheduled and confirmed visits	
	Patients List of serviced patients	

Notes:

- Indicating interest does not mean that a Caregiver is automatically given a shift. Shifts must be assigned by the Agency's Coordinator. Only then does a Caregiver receive an alert, and the shift appears as a scheduled Visit on their Mobile App.
- The Caregiver must be logged in to the Mobile App to review Case Broadcasts in the Open Shifts screen.



## **Open Shifts Map Scaled to Patient Address**

In the *Open Shifts* Map view, the blue highlighted area around the Patient Address represents approximately a one-mile-wide range with a default view of approximately 10 square miles.

Pinch in to zoom out or pinch-out to zoom in to assess the shift and tap *Interested* to express interest or *Not Interested* to bypass.

*Note:* To protect PHI (Protected Health Information), the actual Patient address is not pinned on the map.



Open Shift: Scaled Map View



# **Clocking In and Out**

This topic provides the steps involved when Clocking In and Out of a Visit, as well as entering POC Duties and Patient Signatures.

## **Clocking In**

Step	Action
	Select Today's Schedule from the Main Screen. Select the appropriate visit. In this example, Greg
	Baker.
	7:49 Sprint ♀ 중 ⊕ ⊿ll 100% ੇ
	Ker
1	Greg Baker         09/22/2021           297 W 110th St, Apt 25,         08:00PM         - 08:30PM           NEW YORK, NY, 10026         -         -         -
	Dez Briant         09/22/2021           77 east 53rd stree,         11:00PM           lock box code 3345, BRO
	When the <i>Clock-In/Out</i> tab of the Visit Details page opens, tap <i>Clock In</i> .
	7:58 Sprint 오 중 문 세 100%
	Kerk Visit Detail Greg Baker ⑦ ⊕
	Clock In/Out Directions
	09/22 at <b>08:00PM</b> 09/22 at <b>08:30PM</b>
2	Clock In Clock Out
	- Plan of Care Tasks
	100 - Bath-Tub
	103 - Patient requires Total Care
	Clock In/Out Tab
3	Select either <b>GPS</b> or <b>Security Token</b> to submit an EVV.
	<i>Note:</i> The term Security Token refers to the FOB Device.



Step		Action	
		7:58 Sprint ♀ ♥ ⊕	
		Ker	
		Clock In/Out Directions	
		09/22 at <b>08:00PM</b> 09/22 at <b>08:30PM</b>	
		Clock In Clock Out	
		- Plan of Care Tasks	
		100 - Bath-Tub	
		******	
		GPS	
		Security Token	
		Cancel	
	A successful EVV displays in green under <b>Clock In</b> (now disabled), as shown.		
	Note: Unsuccessful EV/	/ placement times display in red instead of green.	
	<b>Note.</b> Onsuccessful EV		
		8:08 Sprint ♥ ♥ ⊕II 100% II <b>∠</b> Back <b>Visit Detail</b> ⑦ ↔	
		Greg Baker	
		Clock In/Out Directions	
4		09/22 at <b>08:00PM</b> 09/22 at <b>08:30PM</b>	
		Clock In Clock Out	
		Confirmed: 08:07 PM ✔	
		Plan of Care Tasks	
		100 - Bath-Tub	
		103 - Patient requires Total Care	
		Successful EVV	
		page, Caregivers can also access the following:	
	Options (Tab)	Description	
	Directions tab	Syncs to the mobile device's GPS to provide directions to the visit location. Refer to	
		the <u>Directions Map</u> section below for further details.	
5	Patient Info tab	Displays the Patient's name, any phone numbers connected to the profile, their address, and emergency contacts.	
		Contains the Patient's Plan of Care (POC), listing each duty in detail, describing how	
	<i>Care Plan</i> tab	often it is required, and including additional instructions.	
	Notes tab	Maintains a record of notes the Caregiver or Agency makes for the Visit.	


## **Clocking Out**

Step	Action					
	When the Visit is completed, tap <i>Clock Out</i> on the <i>Clock In/Out</i> page. If the Visit included a Plan of Care (POC), the Caregiver is prompted to select the duties performed.					
	Select the <b>checkmark</b> for duties performed or the <b>X</b> for duties refused.					
	In addition, select the <b>Refused Duty Reason</b> (if the Agency requires it) when a duty is marked refused.					
	<b>Note:</b> When servicing Mutual Patients, the Caregiver must enter separate POC duties for each Patient.					
1	8:28 Sprint Cancel Visit Detail Greg Baker Plan of Care Tasks 100 - Bath-Tub Refused Duty Reason: Select Select Select Select Service Performed by Patient Deerformed by Patient Does Not Want 102 - Bath-Bed 102 - Bath-Bed Service Deerformed care Patient Does Not Want Service Performed by Family Member Patient Does Not Want 105 - Mouth Care/Denture Care Service Deerformed care					
	Enter POC Duties If the Contract authorizing the Visit requires a Patient Signature, the Caregiver must obtain the					
	signature on the device to process the Visit.					
	Patient Signature					
2	Skip Signature Disabled					
	4.26 Sprint vi 0 ♥ € al 19%.0 ♦ ack Visit Detail ② ④ Som Butler Signature Pitase enter a signature prior to saving. OK					

#### The Enterprise System







For standard Clock IN and OUT of *Linked and Mutual Patient Visits*, refer to <u>Clock In and Out of Linked</u> and <u>Mutual Visits</u>.

#### **Visit Notes**

Visit Notes can be entered during or after a Visit. Follow the steps outlined below to enter a Visit Note.

Step	Action
	From the <b>Visit Details</b> page, tap the <b>Add Note</b> icon (the circled plus sign), as shown.
	7:58 Sprint     ♥ ♥ ♥ ⇒ all 100% III <back< td="">     Visit Detail Greg Baker     ⑦ ●</back<>
	Clock In/Out Directions
	09/22 at <b>08:00PM</b> 09/22 at <b>08:30PM</b>
1	Clock In Clock Out
	- Plan of Care Tasks
	100 - Bath-Tub
	103 - Patient requires Total Care
	Add Note Select the Note Type: a <i>Visit Text Note,</i> a <i>Visit Voice Note</i> , or a <i>Visit Image Note</i> .
	Notes can be reviewed on the <i>Notes</i> tab on the <b>Visit Detail</b> page. After a Note is saved, it cannot be edited or deleted. Any Note created on the Caregiver Mobile App can be reviewed by your
	Agency/Office.
	6:06 Sprint ¥I ♥ ♥ ⊕ ◢ 75% ■ ▲Back Visit Detail ⑦ ② ④ John Butler
	Visit Text Note Out Directions
	Visit Voice Note <sup>1/30</sup> et 08:15PM
2	Sisit Image Note
	- Plan of Care Tasks
	10 - Eating 🗸
	20 - taken food regularly ?
	49 - stress test 6 — Other Tasks
	10 - Is patient good ? ✓
	11 - Bathing
	Add A Text, Voice, or Image Note

#### The Enterprise System



#### **Directions Map**

The *Directions* map (*Visit Details > Directions*) displays a 5-mile-wide view with a blue dot marking the exact **Patient Address**. Pinch-in to zoom out or pinch-out to zoom in. The map also displays transportation routes and nearby buildings.

2:29 Sprint		🛜 🐨 💷 34% 📓
KBack	Visit Detail Danny Baker	?€
Clock In/Out	Directions	Patient Info
Primary Addre Donald Street,	<b>ss:</b> Park Ave S, NY, NY,	10001
Tapping addre application	ss will open up your	r maps
West You Union City Intrepid Sea & Space Muse	n, Air 🝙	TAN Square
Hoboken	Washington Square Park	LONG ISLAND CITY
sey City	LOWER MANHATTAN WYORK	GREENPOINT
Coogle	HEIGHTS	BEDFORD-STUYVES#

**Directions Map: Zoom Out** 



#### The Enterprise System

2:31 Sprint		🗟 % 🕾 🗐 🖘
<b>K</b> Back	Visit Detail Danny Baker	? •
Clock In/Out	Directions	Patient Info
Primary Addre Donald Street,	e <b>ss:</b> Park Ave S, NY, NY, <sup>*</sup>	10001
Tapping addre application	ss will open up your	maps
Souther the state of the state	<b>°</b>	cy ¢1 <sub>8th Sy</sub> CVS Delivery
Fraiche Takeout		
Coogla		_

Transportation Routes: Zoom In



#### **Community Visit**

Agencies can enable an option to allow a member visit (whether Scheduled or Unscheduled) to be designated as a **Community Visit**.

When enabled, a Caregiver can mark a visit as a *Community Visit* by clicking the icon at the bottomleft of the screen to display the **Community Visit** checkbox.



**Community Visit Option** 

When the user selects the checkbox and taps *Confirm*, the visit is set as a Community Visit and bypasses the requirement for proximity to the member's care location.



**Community Visit Selected** 



#### **Consecutive Shifts**

The **Consecutive Shifts** feature allows Caregivers to perform a single Clock-IN and Clock-OUT for consecutive shifts for the same Patient or for two Linked Patients (Internal Contract), such as a husband and wife receiving back-to-back services at the same address.

Refer to Consecutive Shifts for instructions.



# Clock In and Out of Linked and Mutual Visits

This topic provides examples of Mobile App Clock IN and OUT for Linked and Mutual Patients that are standard without the Consecutive Shifts functionality configured. For Consecutive Shifts, refer to the <u>Consecutive Shifts</u>.

## **Linked Patients**

Linked Patient visits (not enabled with the Consecutive Shift functionality) are treated as two individual shifts; therefore, each Single Shift requires Clock IN and OUT (even though they are linked).

Linked visits are indicated with an "L".

To Clock In, select Visit 1/Patient 1 (john joe) and tap *Clock In* as prompted. The app alerts of a successful Clock IN.



Clock In – Linked Patients

To Clock Out, select Visit 1 and tap *Clock Out*.

Upon Clock Out, the Duties screen appears. Complete the duties section for Patient 1 (**john joe**) and tap *Save*.



POC for Shift 1



Once complete, the app alerts the Caregiver of a successful Clock Out for Visit 1.

<b>く</b> Back	Visit Detail john joe		?⊘+	
	Clock	In/Out	Directions	
05/04 at <b>02:00A</b>	M	05/04 at	02:30AM	
Clock I	n	Cl	ock Out	
Confirmed: 11:	35AM 🗸	Confirm	ed: 11:38AM 🗸	
— You	have beer Clocke		fully	
10 - OK				
100 - uressing/arooming				

**Clock Out for Shift 1** 

Go to Visit 2/Patient 2 (**Will John**) to Clock In. Clock In as prompted. The app alerts of a successful Clock In.

<	Back <b>Toda</b>	y's Scl	nedu	le	?
1.	<b>hn joe</b> EW YORK,NY,1000	D1		/2022 AM - 02 AM - 11	
1	<b>'ill John</b> Ew York,Ny,1000	D1		/2022 AM -02	2:30AM
		* * * * * * * * *	* * * * * *	* * * * * * * *	* * * * * * *
	<b>く</b> Back	Visit Deta Will John		00	Ð
	c	lock In/O	out D	irections	6
	05/04 at <b>02:15AM</b>	05/	04 at <b>02</b> :	30AM	
	Clock In		Cloc	k Out	
	Confirmed::				
	<ul> <li>Plan Of Car</li> </ul>	re Tasks:			
	6 - Assist with walking	Walker			
	10 - Self Administration	n of Meds			
	100 - Dressing/Groomi	ng			
		********	******		***

Clock In – Visit 2



To Clock Out, select Visit 2 and tap *Clock Out*.

Upon Clock Out, the Duties screen appears. Complete the duties section for Patient 2 (Will John) and tap *Save*.

	t Detail II John	?÷			
Cloc	k In/Out	Directions			
05/04 at <b>02:15AM</b>	05/04 at <b>0</b>	2:30AM			
Clock In		ck Out	Cancel	Visit Detail Will John	Save
Confirmed: 11:40AM V			— Plan (	Of Care Tasks:	
- Plan Of Care Ta	asks:		6 - Assist with	walking Walker	✓ X
6 - Assist with walking Walke	r				
10 - Self Administration of M	eds		10 - Self Admi	inistration of Meds	✓ X
100 - Dressina/Groomina			100 - Dressing	g/Grooming	✓ X
100 - Dressing/Grooming			*****		

POC for Shift 2

The app alerts the Caregiver of a successful Clock OUT (for Visit 2).



Clock Out – Visit 2

#### The Enterprise System



#### **Mutual Patients**

Mutual Patient visits are indicated with an "**M**" and the visit time is the same. For Mutual Patients, Clock IN and OUT is performed from either of the two visits.

Once a Caregiver Clocks IN from either of the visits, both visits then indicate the Clock IN time.



**Clock IN - Mutual Visits** 

At Clock OUT of the Mutual Shift, an alert informs the Caregiver that they must manually go into the shift to enter the Duties and Observations for the other Patient.

The POC for the Patient associated with the selected visit (**Smith David**) is presented. Complete as necessary.



POC – Patient 1



Once complete, both Patients are Clocked Out.

Clock	In/Out Directions		
05/04 at <b>04:00AM</b>	05/04 at <b>04:15AM</b>		
Clock In	Clock Out		
Confirmed: 03:57PM 🗸	Confirmed: 03:58PM 🗸		
You have been successfully clocked out for the shifts for both patients.			
( 101 - Hair Care-Comb	ж		
Clock Out	Completed		

Clock Out Completed

Go back into the shift and complete the POC for the other Patient.

Once the POC for Patient 2 (**Mark David**) is manually entered and saved, the Caregiver is alerted of a successful save (as seen in the image).

Clock	Clock In/Out	
05/04 at <b>04:00AM</b>	05/04 at	04:15AM
Clock In	СІ	ock Out
Confirmed: 03:57PM 🗸	Confirm	ed: 03:58PM 🗸
Plan of care task succ	ks have been essfully.	saved
10 -	ок	
101 - Hair Gare-Gomb		

Successful POC Entry





## **Consecutive Shifts**

The **Consecutive Shifts** feature on the HHAeXchange Mobile App allows Caregivers to perform a single Clock-IN and Clock-OUT for consecutive shifts for the same Patient or a Consecutive Shift for two Linked Patients (Internal Contract); such as a husband and wife receiving back-to-back services at the same address. This topic provides the necessary steps to complete a Visit confirmation for consecutive shifts.

*Note:* This feature must be enabled by the Agency. *Patient Signature* requirements are also configured by the Agency. Refer to the *Mobile App Agency Setup Guide* for further guidance.

#### **Consecutive Multiple Shifts – Single Patient**

Select *Today's Schedule* from the main menu. Tap the applicable shift for a single Patient with scheduled consecutive shifts.

*Note:* Consecutive Shifts can also be performed via the *Visits* tab.



The *Visit Detail* screen opens and shows the Start Time and End Time of the Consecutive Shift sequence (Start time of the first shift and End Time of the last shift in the sequence). Tap *Clock In* to begin the Consecutive Shift.

Complete any administrative requirements (if required at Clock-IN, such as Patient Signature with Skip at the start of the shift).



Once Clocked IN, the Confirmed time is presented as the Start time for the Consecutive Shift which is also the start time of the first Visit.





Once all shifts are completed, tap *Clock Out* to end the Consecutive Shift sequence.

8:08 Sprint			°⊖⊿l 100%∎	
<b>K</b> Back	Visit I Greg	Detail <sub>Baker</sub>	? €	
	Clock	In/Out	Directions	
09/22 at 07:00	PM	09/22 at	09:00PM	
Clock I	n	CI	ock Out	
Confirmed: 09:00 PM 🗸				
- Plan of Care Tasks				
100 - Bath-Tub				
103 - Patient requires Total Care				

Upon Clock Out, complete all required administrative tasks (as configured by the Agency) that would normally occur on a per shift basis are presented in sequential order (from first to last shift).

A sequence number is provided in the sub-header to indicate the relative shift number in the sequence.



If configured, the *Signature* screen is presented after the POC screen has been completed for all shifts. The signature provided here is used for all the shifts in the Consecutive Shift sequence that require a signature at Clock-OUT.



If Skip Signature is enabled, then tap *Skip* and select the **Skip Reason** (which is used for all completed shifts in the Consecutive Shift sequence for Clock Out verification. (The same applies to the Signature if required at Clock In.)

⊕ ©	Patient Signature		~
Visit Detail Greg Baker			C
	x		=
Back	Greg Baker	04:25 PM 09/30/2021	
~		Clear Save	

At this stage, the process is complete.

To make edits to the POC, return to Today's Schedule (on the main menu) and select any shift in the Consecutive Shift sequence to apply updates to that specific shift.

After the Consecutive Shift sequence is completed, the Consecutive Shift association is broken.

The user can only enter each shift as an individual shift to make edits up to one hour after the Clock OUT time, which is calculated for all shifts other than the last.

#### Notes:

- If the Caregiver Clocks OUT before the aggregated duration of all shifts in the sequence and does not Clock IN for the remaining shifts, then those remaining shifts will be marked as Missed.
- If there are shifts in a Consecutive Shift sequence that were not started, the Caregiver can Clock IN to those shifts and complete them. If these are Consecutive shifts, then these are treated as a new Consecutive Shift sequence.
- Consecutive Shifts for a Single Patient and Consecutive Shifts for two Linked Patients cannot be comingled.
- Consecutive Shifts does not support rounding at the contract level when there are multiple contracts for the same Patient with different use of rounding.



### **Consecutive Multiple Shifts – Linked Patients** (Internal Contract)

Select **Today's Schedule** from the main menu. Linked Patients are indicated by the bracket with an "L". Tap any of the shifts within the Consecutive Shift sequence.

In this case, Clock IN and Clock OUT is performed only once for the entire shift sequence (maximum of two shifts).

Note: Consecutive Shifts can also be performed via the Visits tab.

KBack Today's S	chedule ?
<b>john joe</b> NEW YORK,NY,10001	05/04/2022 02:00AM - 02:15AM 02:00AM - 02:15AM
Will John NEW YORK,NY,10001	05/04/2022 02:15AM - 02:30AM 02:15AM - 02:30AM
iehn joe NEW YORK,NY,10001	05/04/2022 03:00AM -03:15AM
Will John NEW YORK,NY,10001	05/04/2022 03:15AM - 03:30AM
***	

Linked Consecutive Shifts

The *Visit Detail* screen opens and shows the Start Time and End Time of the Consecutive Shift sequence. Both Patients appear in the Visit Detail header. Tap *Clock In* to begin.

Complete any administrative requirements (if required at Clock-IN, such as Patient Signature at the start of the shift).

If a Signature is required at Clock-IN for both Patients, then the signature for the first Patient is presented at Clock-IN.



Clock In



Once Clocked IN, the Confirmed time is presented as the Start time for the Consecutive Shift.



**Clock In Confirmed** 

Once all shifts are completed, tap *Clock Out* to end the Consecutive Shift sequence.

KBack Visit Detail (?) (+		
Clock In/Out Directions		
05/04 at <b>02:00AM</b> 05/04 at <b>02:30AM</b>		
Clock In	Clock Out	
Confirmed: 11:35AM 🗸		
æ		
- Plan Of Care Tasks:		
10 - Self Administration of Meds		
100 - Dressing/Grooming		

Clock Out

**Note:** The Clock-IN time for the first shift occurs when tapping on the Clock In button. The Clock OUT of the first shift and the Clock IN 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.

Upon Clock Out, complete all required administrative tasks (as configured by the Agency) that would normally occur on a per shift basis are presented in sequential order for each Patient (Patient1/Shift 1, Patient 2/Shift 2).

As the patient specific tasks are presented for each Patient their name will appear in the sub-header. Patient Names are displayed in the top header.







If a signature is required for Patient 2, this signature will be used for both the Clock Out and the Clock In.

If Skip Signature is enabled, tap *Skip* and select the **Skip Reason**.



At this stage, the process is complete.

To make edits to the POC, return to Today's Schedule (on the main menu) and select any shift in the Consecutive Shift sequence to apply updates.

After the Consecutive Shift sequence is completed, the Consecutive Shift association is broken.

The user can only enter each shift as an individual shift to make edits up to one hour after the Clock OUT time (calculated for all shifts other than the last).

#### The Enterprise System



Notes:

- If the Caregiver Clocks OUT before the aggregated duration of both shifts in the sequence, then the second shift is marked as Missed.
- If the second shift in a 2 patient Linked Consecutive Shift sequence was not started, then the Caregiver can Clock In to the second shift to complete it.
- Consecutive Shifts for a Single Patient and Consecutive Shifts for 2 Linked Patients cannot be comingled.
- Consecutive Shifts does not support rounding at the contract level when there are multiple contracts for the same Patient with different use of rounding.



## **Additonal Features**

#### **Settings and User Agreement**

On the Main screen, select the Settings icon (3-dots) to access additional features such as change password and review User Agreement Terms.



Settings Icon on the Main Screen

Update Profile Mobile ID (Unavailable)
Mobile Device ID: AB203BBF3D0 The ID number of this specific mobile device Change Password
Privacy Policy
User Agreement
End User License Agreement
Logout
Version: 21.09.01 © 2021 HHAeXchange

**Settings Menu** 



#### **User Guide**

Tap the **Help** icon (question mark) to access the Mobile App user guide.



Settings Icon on the Main Screen



Help Guide





#### **Patient Search**

Caregivers can search for Patients they have access to or have previously provided service for.

On the **Patients** page, click the Search icon (magnifying glass) to open the search bar, prompting the entry of either a Patient's Name or Address.

6:36 Spri	nt		¥! ? 8	i.⊪ 66%∎́
<b>K</b> Back	l	Patients	5	Q (?)
<b>02 02</b> SCHENECTA Excellence Q		45,		
Danny Bake Donald Stree HHAeXchang	t, Park Ave	S, NY, NY, 1	0001,	
	ch Icon	on the		-
6:32 S <b>&amp;Back</b>			<u>#</u> # \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	
	<b>aker</b> reet, Park Ave ange Office	s, NY, NY, 1	0001,	
~~	~~~		~~/	
<	Danny	Danny's	dand	y
1 2	3 4	5 6	7 8	9 0
q <sup>*</sup> w	e r	t ' y	u i	o <sup>[</sup> p <sup>1</sup>
a	s d	f <sup>®</sup> g <sup>®</sup> ł	n <sup>®</sup> j <sup>°</sup> k	( I)
Ŷ	zx	c v k	n m	n <sup>?</sup>
!#1	?	English (US)		Done

Patient Search

#### Timeout

To better secure access to sensitive Patient data, the Caregiver Mobile Application times out and logs the user out of the application after 15 minutes of inactivity. All data is saved when the application times out and closes. If the application has timed out, the user must log in again to continue using the application.



## Language Options

The Mobile App offers language options designed to accommodate Caregivers with their preferred language when using their mobile device.

Available languages include:

- English (North America)
- Spanish (Latin America)
- French (European)
- Chinese (Traditional)
- Russian
- Haitian Creole
- Korean
- Albanian
- Arabic
- Armenian
- Bengali
- Polish
- Uzbek
- Vietnamese
- Hmong
- Thai
- Somali
- Cambodian
- Karen (Burmese)

*Note:* Other languages may be added in future releases.

Instructions on how to change language settings are provided in the following table.

Step	Action
	Tap the <b>Options</b> icon on the top-right, as shown.
1	633 Sprint       II @ @ all 79%         Image: Schedule       Image: Schedule         Image: Schedule       Image: Schedule
	From the list of entions, select <b>Change Language</b>
2	From the list of options, select <b>Change Language</b> .



The Enterprise System

Step	Action
	Mobile ID 1094879         Used to link your account to 1 or more apprices         Mobile Device ID: AB203BBF3D0         The ID number of this specific mobile device         Change Password         Linked Agencies         Change Language         Privacy Policy         User Agreement         Logout         Version: 21.09.01         © 2021 HHAekChange
3	From the list of available languages, thumb-scroll to select the desired language. When selected, tap Apply (at the bottom of the screen) to save the language of choice.
4	After selecting the preferred language, all menu items appear in the chosen language. In this example, Spanish was the selected language.



Step	Action
	6:35 Sprint       National Home Care LLC         National Home Care LLC       Image: Click here for your required training, powered by Nevron         Click here for your required training, powered by Nevron       Varmos         Horario       Horario para hoy         Visitas programadas para 09/21/2021       Visitas programadas en el calendario         Visitas no programadas       Visitas no programadas en el calendario         Visitas programadas y confirmadas       Lista de visitas programadas y confirmadas         Lista de pacientes       Lista de pacientes revisados         Centro de Comunicaciones       Mensajes         Mensajes de la Agencia.       Mensajes de la Agencia.
	Language Applied
	<i>Note:</i> To see Map functionality displayed in the selected language, users must first change the language, then restart the application.





#### Log-In Page Language Selector

When logging in, if the Mobile App *Log In* page is displayed in an unfamiliar language, the user can click the **Language Selector** icon at the bottom center of the *Log In* page to select a different language.

10:50 Sprint	t 🔌 🗟 🐨 📶 63% 🛢
*	Real Time Web-Based Management Solutions for Home Care Agencies & Payers
Forgot Pa	issword?
Save Us	ser ID: Yes
	Log In
Mobile Der <b>Sign Up</b>	vice ID: AB203 Version: 21.06.01

Language Selector icon on Log In page





## **Patient Phone Number Descriptions**

Patient phone number labels appear on the Caregiver Mobile app corresponding to the descriptions entered in the **Phone 2** and **Phone 3** fields in the Patient Profile in the HHAX platform, as shown.

6:58 Sprint 🛛 💜 🕾 🗐 🕯 🕯		
K <sup>Back</sup> Pa	atient Detai John Smith	il 🧿
	Patient Info	Visits
Excellence (	John Smith A - ML (Exceller	ice QA Team)
Phone 1	425-345-2353	
Phone 2	349-503-5234	(Doctor's Off)
Phone 3	561-303-2200	(Cell Phone)
Address 1	100 1st street, BUTLER, PA, 160017987	
Emergency Conta	acts	
emergency	ent has not pro contact. if this contact your a	s is an error

**Phone Number Description Labels** 



## **Offline Mode**

This feature must be enabled by the Agency/Office to be available for Caregivers.

This feature allows Caregivers to use the Mobile App when there is no internet connectivity; later to synchronize when connectivity is restored. With this feature enabled, Caregivers can Clock IN/OUT successfully while offline. Once the internet connectivity is restored, the Mobile App synchronizes with the HHAX system and new and modified Visit information is exchanged between the HHAX System and the Caregiver Mobile App according to the Agency-defined sync period.

Synchronization occurs for the Caregiver on the Mobile App when any of the following actions take place online:

- Logging In
- Switching Agencies
- Changing Languages

During synchronization, the Mobile App downloads the next Visits for the synchronization period as defined by the Agency at the Office Level. This value can range from 24 hours to 120 hours with 24 hours as the default.

The only indicator that the Caregiver has when in Offline mode is the Offline Mode Active message alert that appears at the bottom of the Home screen (as seen in the image).



Mobile App Offline Mode Active

When in Offline Mode, the Caregiver can access Visits via the **Today's Schedule** screen and perform the following:

- Clock-IN/OUT
- Signature with Skip, and



#### • Enter Duties

Outside of the actions listed above, all other Mobile App functions are unavailable in Offline Mode. Selecting any other function results in the **Network Notice** screen (as seen in the image).



Mobile App Network Notice

Not Supported in Offline Mode:

- My Availability
- Open shift
- Messages
- Patients
- Sign up
- Forgot Password
- Change Password
- Change Language
- Change Agencies
- Notes
- Care Insights
- Time Edit Requests

#### Cautions

Note the following cautions regarding the behavior of the Mobile App while in Offline Mode:

- 1. When online, Visits created on the same day by the Agency are almost immediately available to the Mobile App when the Caregiver goes to **Today's Schedule**. In Offline Mode, this behavior changes and new and modified visit data is not available until synchronization occurs (i.e., when the user *logs in, switches agencies, switches languages*, or clicks on *Unscheduled Visit, Visits*, or *Patients*).
- 2. If the Caregiver is in **Today's Schedule** when online and then goes offline, then the Caregiver is redirected back to the home page where the **Offline Mode Active** message appears. Note that once offline, the Caregiver may start a Visit which is then altered by the Agency. In this case, any



reconciliation of that Visit must be performed manually by the Agency after the Caregiver goes back online and synchronization takes place.

3. When offline, the Confirmed Time of a completed Visit is calculated using the device's local time and reconciled with the HHAX system once Internet connectivity is restored.

#### **Offline Authentication**

Because credentials cannot be authenticated with the HHAX system when offline, the Mobile app securely stores the last known credentials on the mobile device for the Caregiver to log in when in Offline Mode. The user is allowed up to three attempts to log before they are prompted to wait three minutes to retry.



## **Mobile App Password Reset**

#### Forgot Password?

A Caregiver can reset their own mobile app password directly from the Login screen as shown in the sequence below.

Click on the Forgot Password? link.

Real Time Web-Based Management Solutions for Home Care Agencies & Payers
Email
Password
Forgot Password? Save Lutter: Yes
Login

Enter the **Email** or **Phone Number** associated with the account, where a temporary password is sent. Click *Reset Password*.

Cancel Forgot Password
Enter Email Address or Phone Number
If providing a Phone Number just enter the digits. SMS charges may apply when using a Phone Number.
Reset Password
*****

The app prompts the Caregiver to enter the **Current Password** (enter the temporary password received), a **New Password**, and **Re-Enter New Password** (to confirm). Click **Confirm** to log in to the app.



Cancel Change Password	?
Password Requirements: - Minimum 8 characters - At least 1 capital letter - At least 1 number	
Current Password	
New Password	
Confirm	

#### Account Locked

The Mobile App issues a temporary password (via the last used delivery method, such as text or email) if a Caregiver is locked out after 3 failed login attempts (as seen in the images below).

9:52 Sprint 🔍 🗟 🕾 🗐 📶 100% 🗎		
Real Time Web-Based Management Solutions for Home Care Agencies & Payers		
anjan223@ex.com		
Password		
Forgot Password?		
Account has been locked and a new temp Password was sent to you. For additional assistance please contact your Agency.		
ок		
Account has been locked and a new temp Password was sent to you. For additional assistance please contact your Agency.		
Mobile Device ID: AB203 Version: 21.09.01		
Sign Up Help Center		

iOS



#### The Enterprise System

<b>२ ¥</b> 🗐	.ııl 78% 🖬 02:11	
Real Time Web-Based Manage	ement	
ccellence104@live.com	1	
Account has been locked and a new temp Password was sent to you. For additional assistance please contact your Agency. OK		
Login Account has been locked and a new temp Password was sent to you. For additional assistance please contact your Agency.		
ce ID: 04EDF2554E911BF4	Version: 6.4.1 Help Center	
	Callence104@live.com  Callence104@live.com	

Android



## Mobile App Caregiver Time Edit Corrections

The HHAX Mobile App currently captures real-time Caregiver EVV vian FOB or GPS methods. If EVV confirmations are missed, or do not accurately reflect the Start/End times of services, then Agencies can allow Caregivers to submit a request using the Mobile App to update Start and/or End times for service.

In the request, the Caregiver must provide the reason for their manual time correction, with any additional notes. A Patient signature is also captured at the time of the correction. These requests are received in the system where an authorized Office User approves or rejects the request.

- If *approved*, then the Visit is updated with the requested times and the Visit reason, and the new Confirmed Time is approved.
- If <u>rejected</u>, then the Caregiver receives a note on the Mobile App, and the Confirmed Time remains unchanged.

Notes:

- Requests are reviewed and approved (or rejected) by an authorized Agency representative.
- The Patient Signature is always required when requesting a Time Correction Edit.
- If a Confirmed time is blank (--:--) at Clock IN and/or Clock OUT, the edit icon becomes available for a Caregiver Time Edit Request after the end of the visit.
- A Caregiver can request a Time Correction Edit up until the visit is billed.

After Clock IN (or Clock Out), the edit icon appears below the Confirmed time. To request an edit, tap the edit icon.



Clock In: Edit Icon Example



Note: An edit icon below the Confirmed time indicates a user can request to change the time.

The *Time Correction* page opens. Select the correct time in **Corrected** (required) and tap **Done**.



**Select Time Correction** 

Select the Reason (required). Type a Note (optional) and tap Next.



**Required Edit Fields** 

The Patient Signature page appears. Obtain the Patient Signature and tap *Save*.

<b>&lt;</b> Back	Time Correction	
john joe 04/29/2022 Clear Save	×	Patient Signature

**Required Patient Signature** 



**Note:** Patient Signature is required for ALL Time Edit Requests.

An alert appears announcing that the time correction request was sent successfully.



Successful Time Correction Request

Tap **OK** to continue.

The **Confirmed** time appears in **orange** pending approval from the Agency/Office.

K Back	Visit Detail john joe			<b>?</b> +
	Clock lı	n/Out	Dire	ections
04/29 at <b>01:00AN</b>	И	04/29 at	01:15	AM
Clock In	in Cloc		ock	Out
Confirmed: 01:1	5AM 🕓	Confirm	<b>ed:</b> 0	01:48AM 🗸
				Ø
<ul> <li>Plan Of Care Tasks:</li> </ul>				
10 - Self Administrati	on of Meds			~
100 - Dressing/Grooi	ming			x

**Request Pending** 

To Clock OUT, tap *Clock Out*, select the EVV method, and select the POC tasks performed. Tap *Save* to complete.

If a Time Correction Edit applies to Clock OUT, repeat Steps 2-6 to submit a Time Correction Edit Request. Confirmed times appear in orange pending approval from the Agency/Office (as shown).





<b>く</b> Back	Visit Detail john joe		<b>?</b> +
	Clock In/Out		Directions
04/29 at <b>01:00A</b>	AM 04/29 at 01:15AM		01:15AM
Clock I	n	Clock Out	
Confirmed: 01:	15AM 🕓	Confirm	ed: 02:00AM 🕓
<ul> <li>Plan Of Care Tasks:</li> </ul>			
10 - Self Administration of Meds			
100 - Dressing/Gro	oming		X

Time Edit Request Pending

When approved, the Confirmed times appear in green.

**Note:** If the request is rejected, the Confirmed time(s) remains unchanged.



## **Automatic Time Setting Option**

The Mobile App provides a pop-up warning suggesting for users to set their device to the Automatic Time setting which automatically synchronizes with the central server clock (to include Daylight Savings Time (DST) updates).

A warning alert is displayed (as seen in the image below) if the time on the user's Mobile App is not in sync with the server. This occurs when the device time setting is NOT using the Automatic Time setting.

As suggested, this alert instructs the user to change their settings to ensure proper operation of the application.

**Note:** <u>HHAX does not change the setting</u>; Users must change their own settings on their device. In addition, retaining the Manual Time setting does not prevent a user from using the Mobile App.





## **Mobile App Caregiver Compliance Alerts**

The **Mobile App Caregiver Compliance Alerts** feature displays a Caregiver's Compliance status (based on Discipline) directly on their Mobile App; informing them of completed as well as upcoming medical and evaluation due dates (to assist with remaining compliant).



New Compliance Alert Option

#### **Mobile App Compliance Page**

The informational *Compliance* screen on the Mobile App is accessed from the main screen, as seen on the image above. The encircled number in red in the main page indicates the number of items needing attention. Select the *Compliance* option to view high-level information (such as *Type*, *Due Date*, and *Completed Status*) for all the Caregiver's Compliance items, as seen in the image below.

- Overdue items have bolded titles under the Name/Type column
- Under the Completed column, Overdue items are clearly categorized as Overdue and marked with a red dot.



**Compliance Screen** 



Click on the filter icon (on the top-right) to open a search selection to view specific information.



**Compliance Screen** 

Select the available information such as **Compliance Type**, **Date Range**, or select the **Only Display Past Due** radio button to display only the due items.



## **Caregiver Awake/Alert Confirmation**

The **Caregiver Awake Alert Confirmation** feature applies to Caregivers who work overnight shifts. When this feature is enabled by an Agency, a Caregiver is presented with an *I'm Awake* button at Clock-IN. This function serves as proof to the Agency that the Caregiver is awake and monitoring the Patient. The Caregiver can periodically check in via the *I'm Awake* button throughout the visit.

Once the feature is enabled, the Caregiver is presented with an *I'm Awake* button after Clock-In (as seen in the following image) as proof that they are awake and servicing the Patient.

4:32 Sprint			হু 😌 💷 56% 🖥	
<b>K</b> Back	Visit Detail Danny Baker		? €	
	Clock In/Out		Directions	
09/29 at <b>11:0</b>	0PM	09/30 at 12:00AM		
Clock		Clock Out		
Confirmed: 04:26 PM 🔇				
I'm Awake				
Last Check In: Just Now				

Mobile App: I'm Awake Button

When clicking on the *I'm Awake* button, the **Confirmed** time is captured, and a timer begins to clock Check In status. The Check In status is displayed under the button (indicating the duration since the last Check In).

4:31 Sprint			중 😌 폐 56% 🖻	
<b>K</b> Back		<b>Detail</b> / <sup>Baker</sup>	? €	
	Cloc	k In/Out	Directions	
09/29 at <b>11:00</b>	)PM	09/30 at <b>12:00AM</b>		
Clock		Clock Out		
Confirmed: 04:26 PM 😢				
I'm Awake				
Last Check In: 00 hours 01 minutes				

Note: The Caregiver can periodically check in via the *I'm Awake* button throughout the visit.

# \* HHAeXchange

## **GPS EVV Method to Reduce OOR Exceptions**

To reduce the number of *Out Of Range* (OOR) calls on the Call Dashboard, the Mobile App provides guidance to a Caregiver using the GPS EVV method. A Caregiver is presented with their real-time location on a map relative to the Patient before committing to the Clock-In and Clock-Out. The application can provide guidance to move closer to the Patient to be within the established tolerance range defined by the agency.

Once the feature is enabled by the Agency, a Caregiver using the GPS EVV method, is presented with a real-time map location relative to the Patient address. This helps them evaluate and approximate to an "In Range" coordinate before confirming a Clock-In or Clock Out.

The Patient is represented by the blue dot in the middle, and the Caregiver is represented by a blue dot and arrow (serving as a directional compass as the Caregiver moves). The light blue circle represents the Tolerance Range in feet (as defined by the Agency; capped at 1,000 feet). Guidance is provided below the map assisting with proximity.

The image on the left indicates that the Caregiver is likely **Out of Range** while the image on the right illustrates the Caregiver closer to the Patient and **In Range**. Once **In Range**, the Caregiver can click on the **Confirm** button to capture the EVV.





## Patient Address PIN on GPS Map Confirmation

A PIN denotes the Patient Address in the GPS Map View at Clock In and Clock Out when the Patient Address is not GPS-enabled. If there are coordinates available (latitude and longitude), then the PIN for the Patient Address is displayed as a blue dot surrounded by a light blue circle indicating the tolerance range (as seen in the image below to the left).

When the Caregiver clicks on the *Confirm* button, a message alerts that there may an issue with the Patient Address. It is recommended to contact the Agency to report (as seen in the image below to the right).



**Patient Address with Coordinates** 



In cases where the Patient Address is not GPS-enabled without available coordinates, the screen displays only the Caregiver location, as denoted by the blue dot and arrow.

The Patient Address is listed at the bottom of the screen (highlighted in the image). When the Caregiver clicks on the *Confirm* button, the same alert (as seen above right) appears.



#### The Enterprise System



Patient Address without Coordinates

Note: To prevent issues with a Patient Address, it is recommended that the GPS is enabled in the system.





## **Mobile App Nevvon Integration**

HHAeXchange has partnered with Nevvon, a leading training provider for Caregivers.

The image below shows the banner that appears on the HHAX Mobile App Home screen once an Agency purchases one or more Nevvon training modules.

Click on the *Go* button to open the Nevvon website.



Mobile App: Nevvon Training Banner