![HHAeXchange logo]

Caregiver Mobile App Process Guide

Caregiver Setup and Use

Contents

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 HHAeXchange Client Support. 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 HHAX Support Team 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 **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)

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.
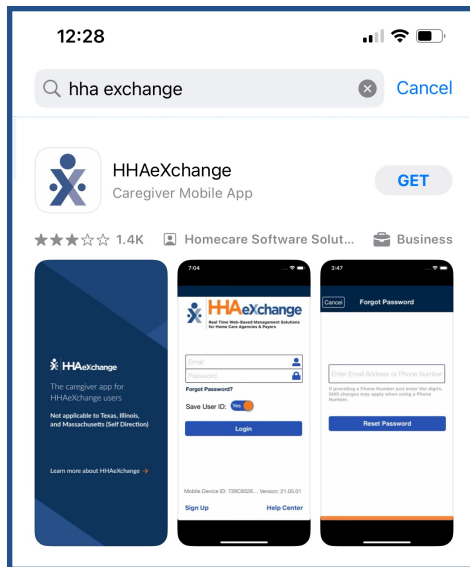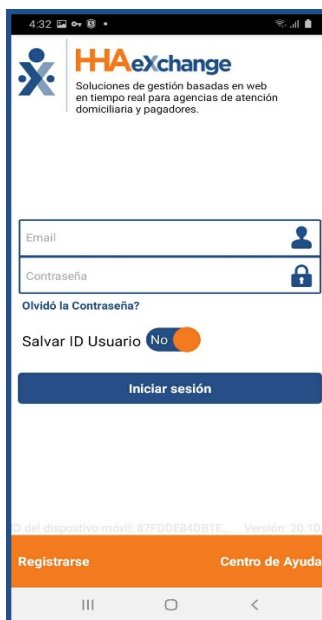

HHAeXchange Mobile App

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.
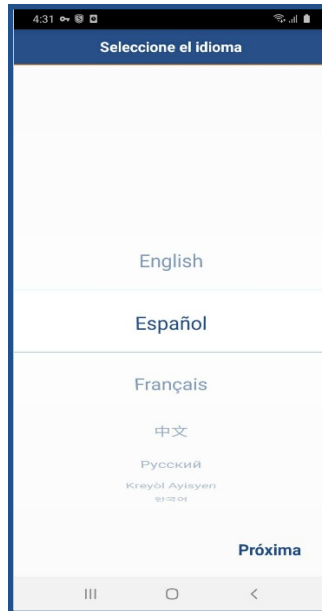
Select Language (Spanish)

Creating Credentials (Spanish)

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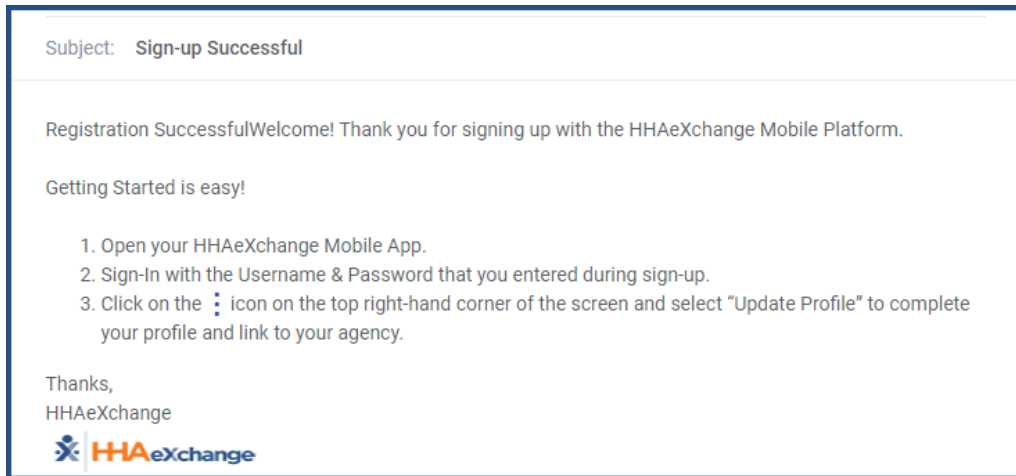
- An **Email Address**
- A **Password** (minimum of 8 letters, 1 capital, and 1 numeric value)

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

Sign Up Screen

Upon successfully creating an account, the system issues a verification email:
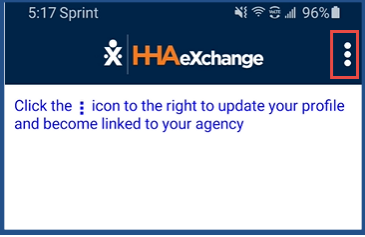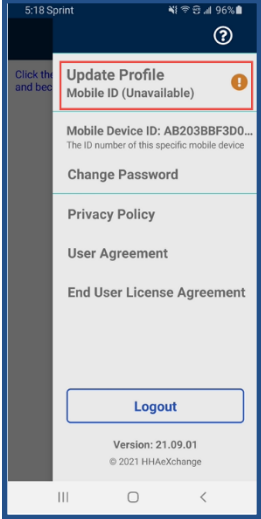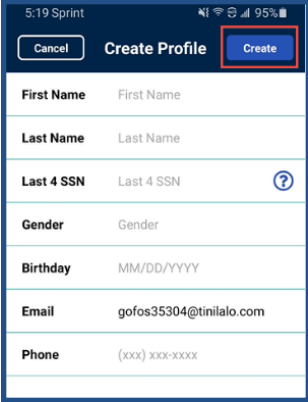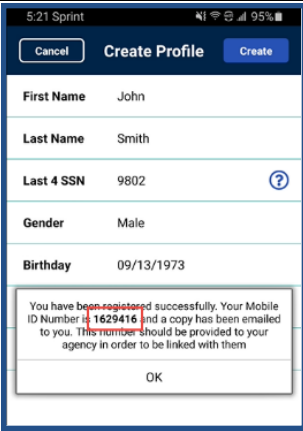
Successful Sign Up Email

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 ***three-dot icon*** (at top right) as prompted by the message, and tap ***Update Profile***.

Step	Action
	Click the ⋮ icon to the right to update your profile and become linked to your agency
4	Complete all the fields on the *Create Profile* page. Tap **Create** 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	When all the information is entered correctly, a message appears containing the **Mobile ID**.

Step	Action

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:
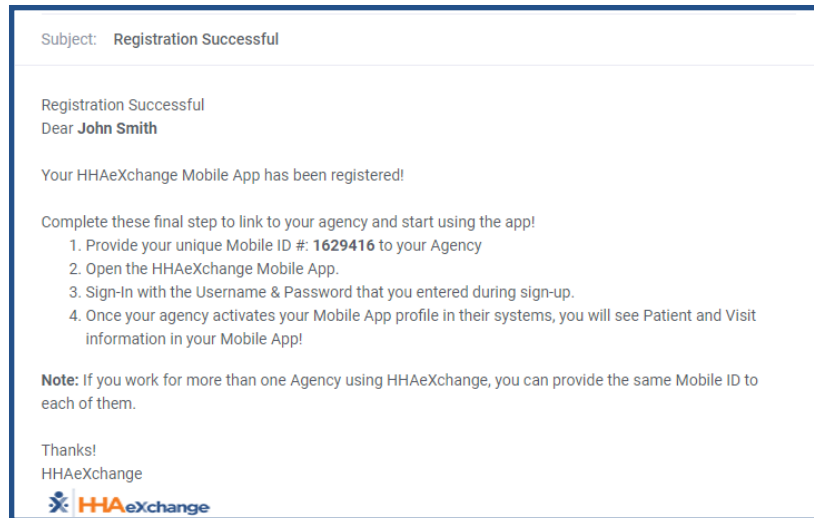
Successful Registration Email

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.

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.
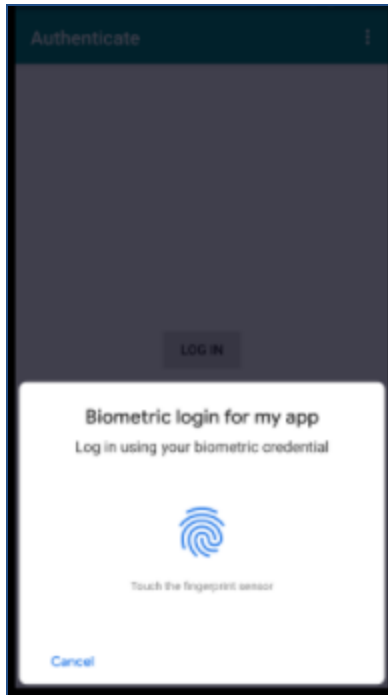
Mobile Biometric Two-Factor Authentication

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).
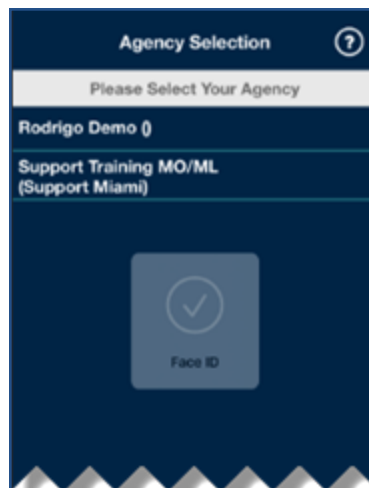
Facial Recognition

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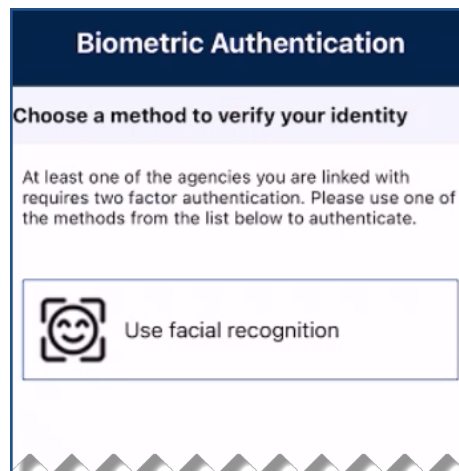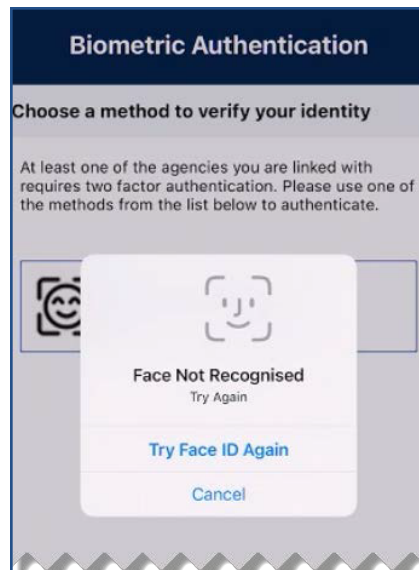

Facial Recognition Required

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

Success: Face ID

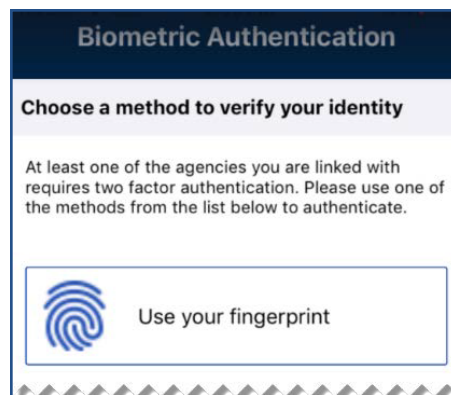If facial recognition is not successful, the app prompts the user to retry.

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.
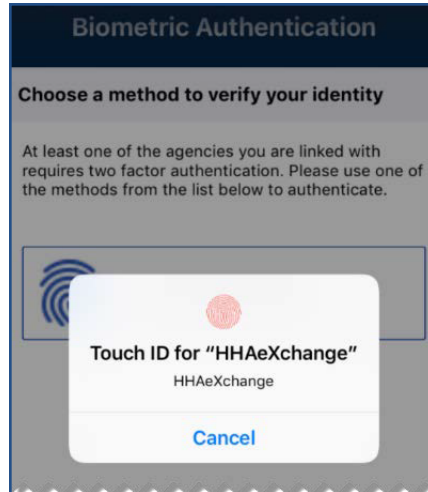
Use Touch ID to Authenticate

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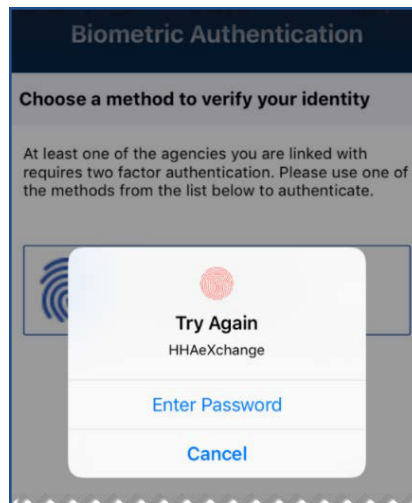
Retry Authentication

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.
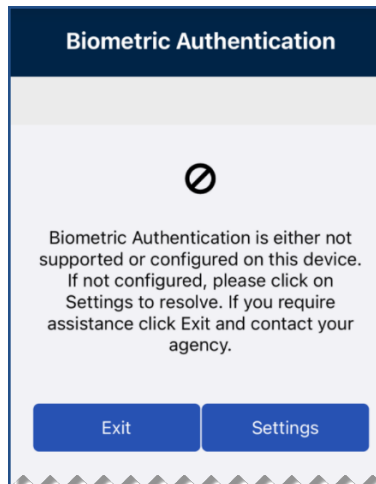
Device Not Configured/Supported

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 HHAX Support Team 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.
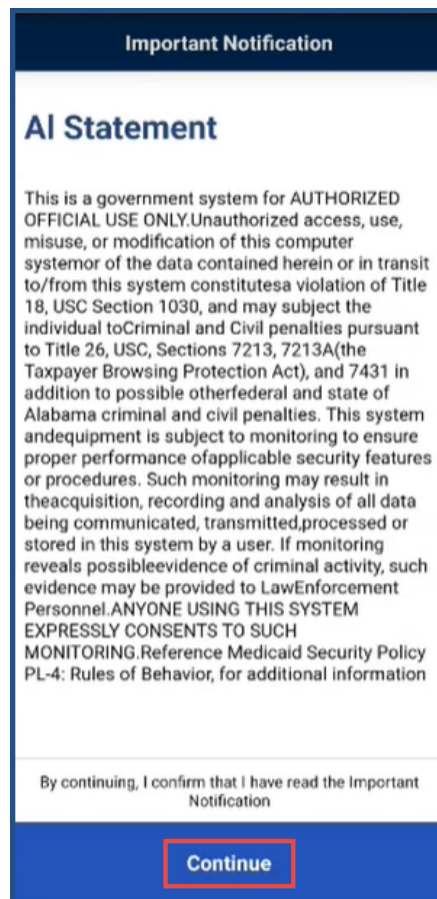

Important Notification

AI 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 ofapplicable 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.
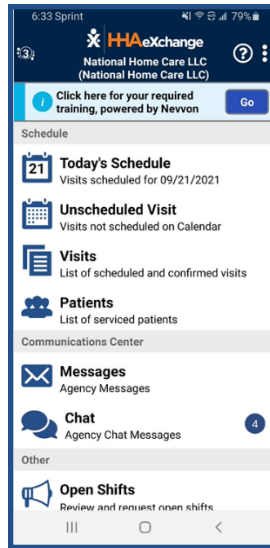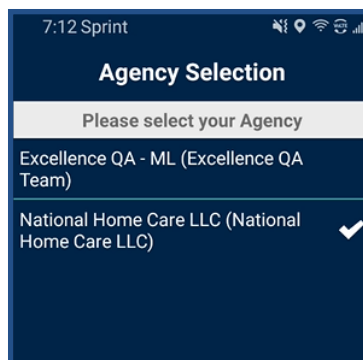

The Main Screen

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.
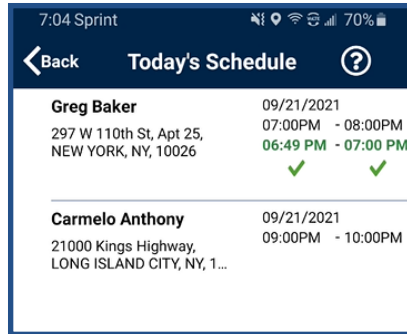
Today's Schedule

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.
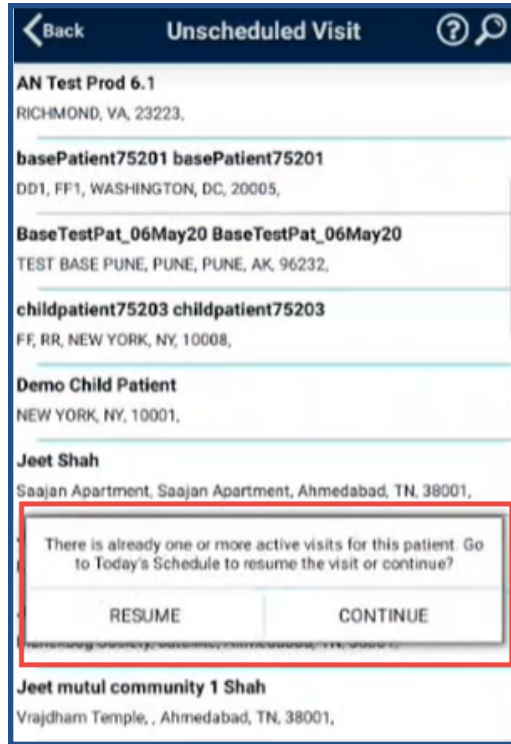

Create Unscheduled Visits

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.
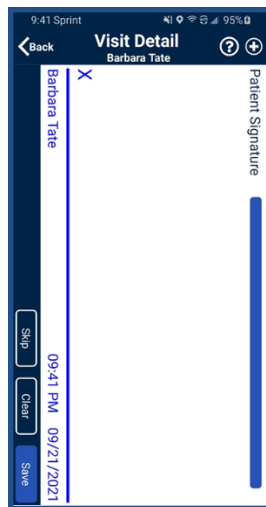

Scheduled Visit/Unscheduled Visit Option

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.
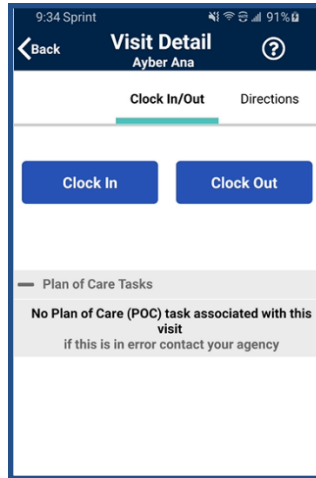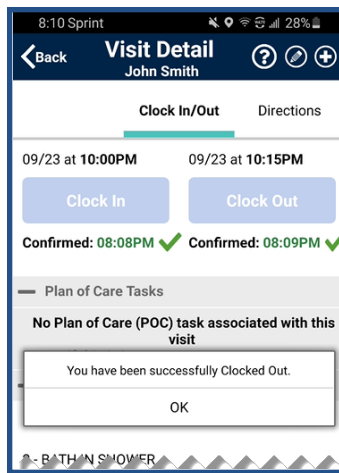
Clock IN/OUT

**Patient Signature**
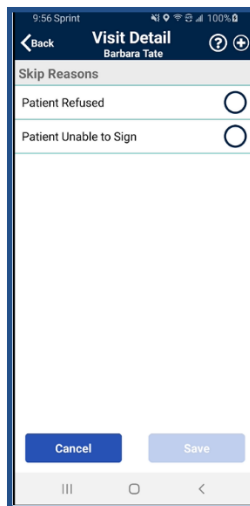
Skip Reason (if Skipped)

Confirmation Times
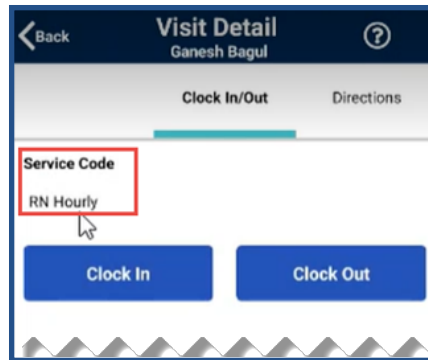
Select Service Code for an Unscheduled Visit

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**.
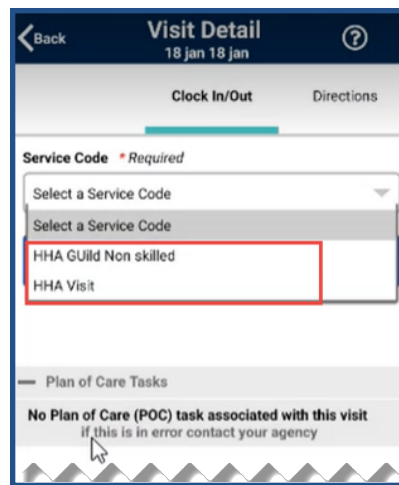
Selecting a Service Code for an Unscheduled Visit

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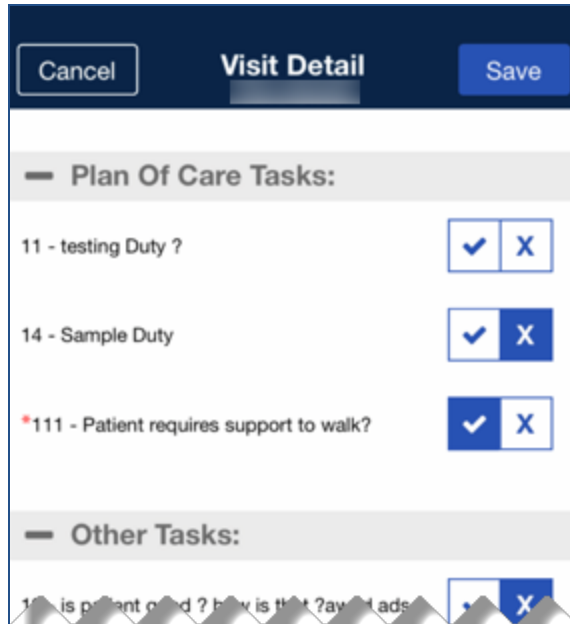

Only One Service Code Available

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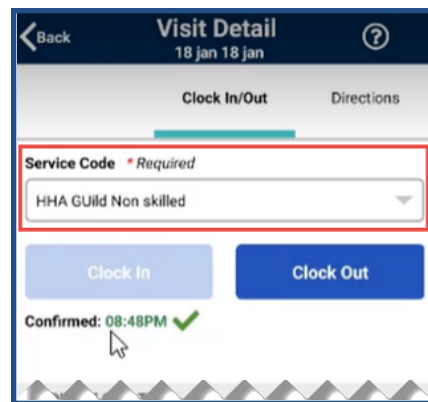
Changing Service Code on Clock Out

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.
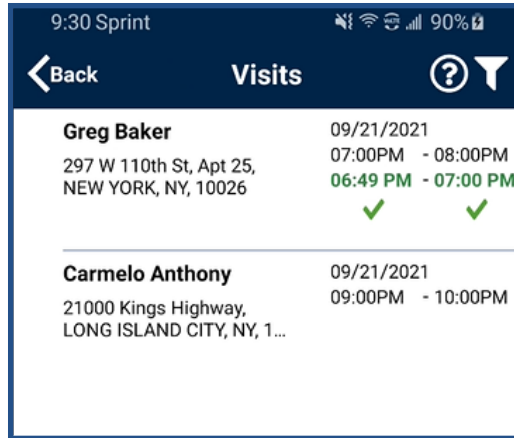

POC Tasks Displayed for Unscheduled Visit

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.
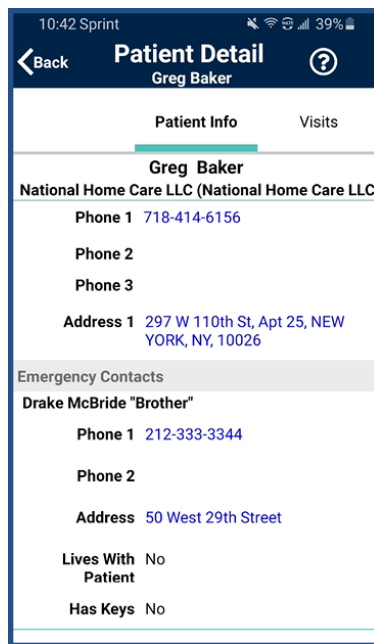
Visits

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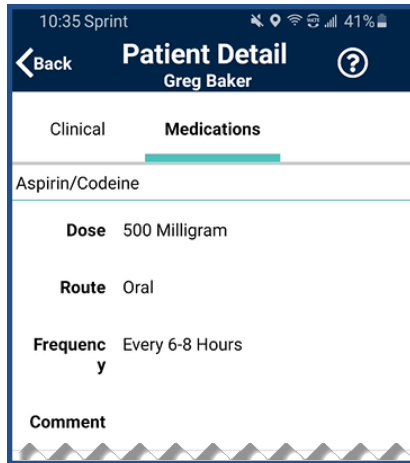

Completed and Scheduled Visits

Patients

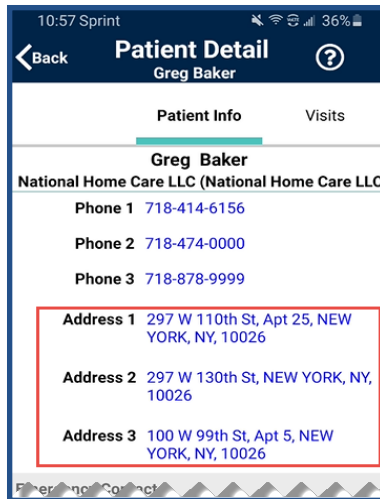Select **Patients** to view a list of all Patients the Caregiver can access. Select a Patient to view Patient Info and Visits.

Patient Details: Info

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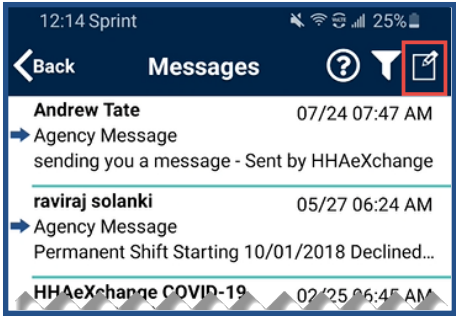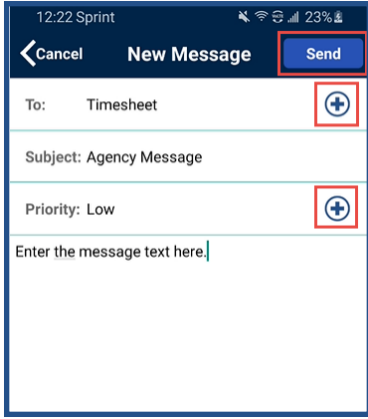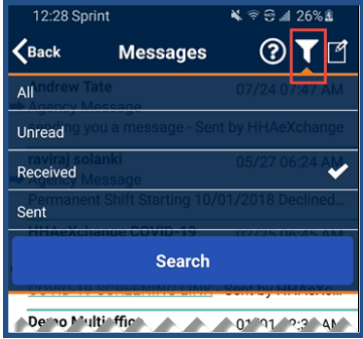
Patient Details: Medications

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

Patient Multi-Address

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
1	Tap the notepad icon (as shown) to enter a new message or respond to an existing one. **Agency Messages**
2	When the Message window opens, tap the *plus* icon to select a recipient (To) and Priority. Compose the message in the text area. Tap **Send** to send the message.
3	To sort existing messages, tap the *filter* icon as shown in the **Sort Messages** 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.

Archive prompt

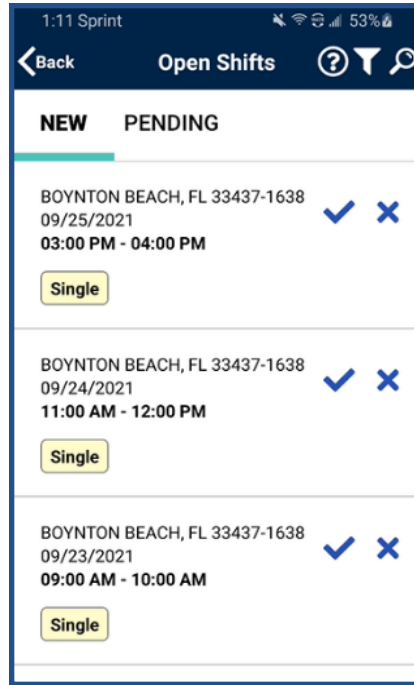Tap **Yes**, and the message is archived and hidden from view.

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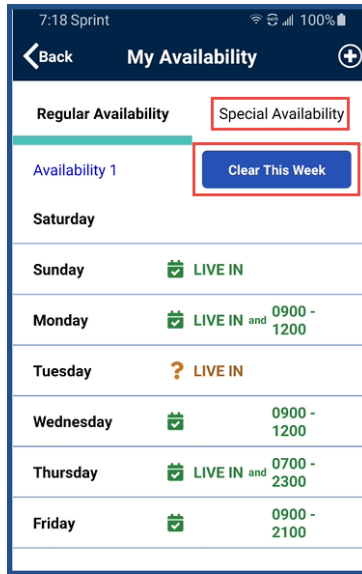

Messages Filter

Open Shifts

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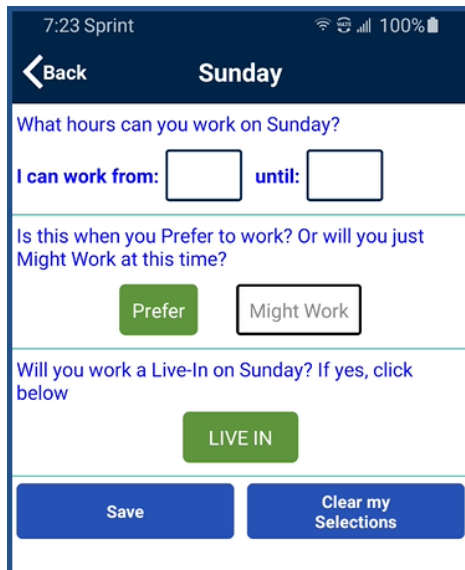

Open Shifts

My Availability

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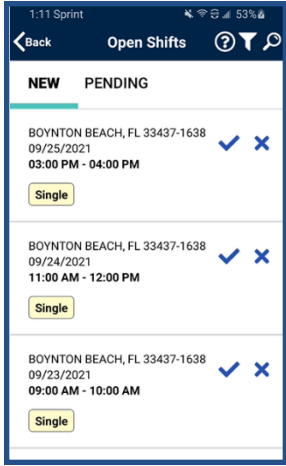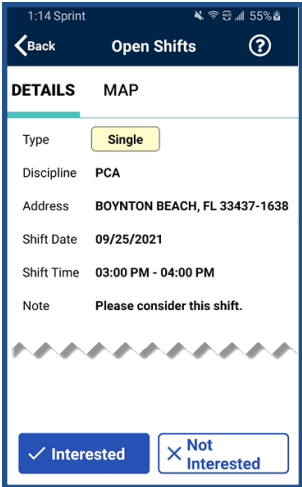

My Availability

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.
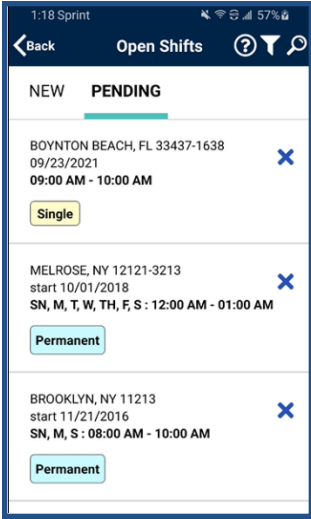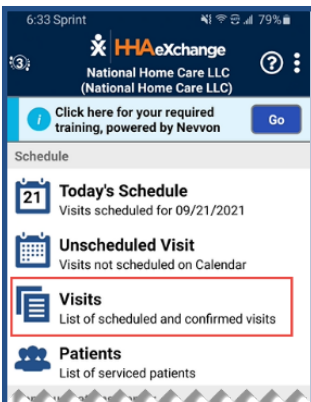

Edit Regular Availability

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
1	The **Open Shifts** screen appears displaying all broadcast shifts on the **New** tab. Shifts are labeled as **Single** or **Permanent**.
2	After tapping the line item, the **Details** tab opens, providing basic information. Tap *Interested* (to express interest in working the shift) or *Not Interested* (to reject and remove from the list) after evaluating the shift. Tap the *Map* tab to access the Google Map visual. Refer to the Open Shifts Map Scaled to Patient Address section below. *Note:* 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.

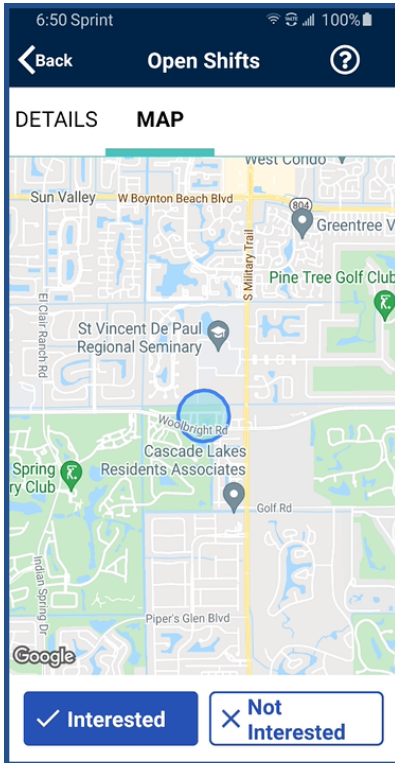| Step	Action
3	Requested shifts move to the **Pending** tab, pending assignment from the Agency's Coordinator.
4	When a shift is assigned to the Caregiver, the shift moves from the **Pending** tab to the Caregiver's **Visits** section. The Caregiver is alerted of the assignment. When the Agency *rejects* the request, the shift is removed from the **Pending** tab, and a message is sent to the Caregiver with the rejection reason (such as "Shift no longer available").

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.

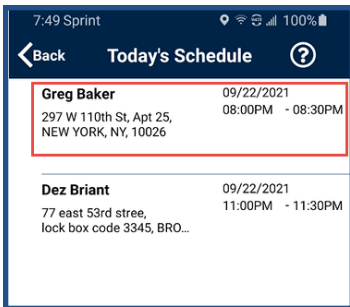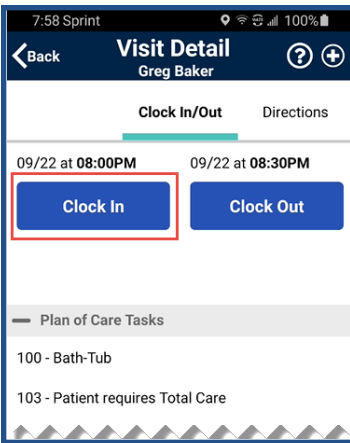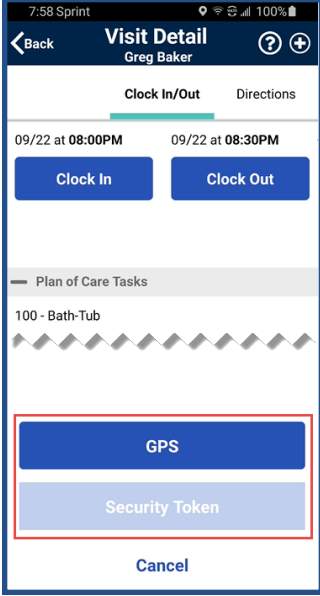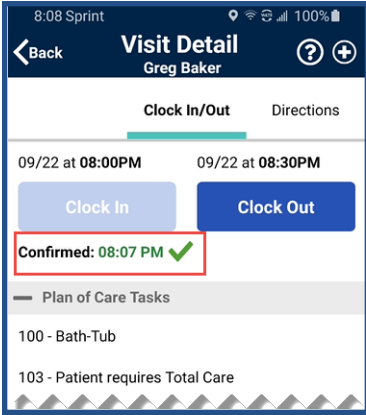*Note: To protect PHI (Protected Health Information), the actual Patient address is not pinned on the map.*

Open Shift: Scaled Map View
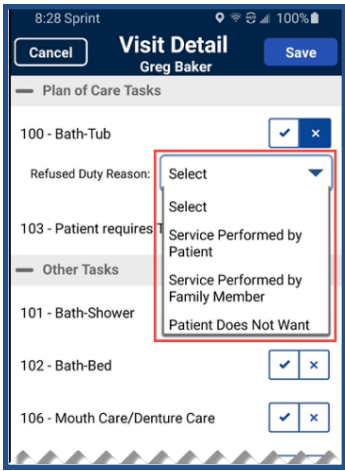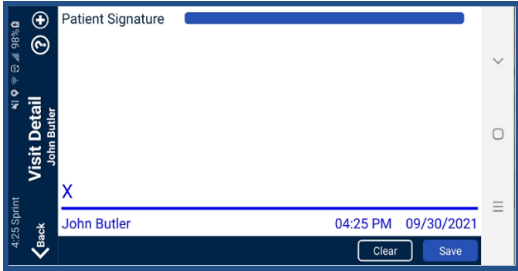
Clocking In and Out

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
1	Select **Today's Schedule** from the Main Screen. Select the appropriate visit. In this example, **Greg Baker**.
2	When the *Clock-In/Out* tab of the Visit Details page opens, tap **Clock In**.
3	Select either **GPS** or **Security Token** to submit an EVV. **Note:** *The term Security Token refers to the FOB Device.*

Step	Action
4	A successful EVV displays in green under **Clock In** (now disabled), as shown. **Note:** *Unsuccessful EVV placement times display in red instead of green.* **Successful EVV**
5	From the *Visit Detail* page, Caregivers can also access the following: <table><tr><th>Options (Tab)</th><th>Description</th></tr><tr><td>*Directions* tab</td><td>Syncs to the mobile device's GPS to provide directions to the visit location. Refer to the Directions Map section below for further details.</td></tr><tr><td>*Patient Info* tab</td><td>Displays the Patient's name, any phone numbers connected to the profile, their address, and emergency contacts.</td></tr><tr><td>*Care Plan* tab</td><td>Contains the Patient's Plan of Care (POC), listing each duty in detail, describing how often it is required, and including additional instructions.</td></tr><tr><td>*Notes* tab</td><td>Maintains a record of notes the Caregiver or Agency makes for the Visit.</td></tr></table>

Clocking Out
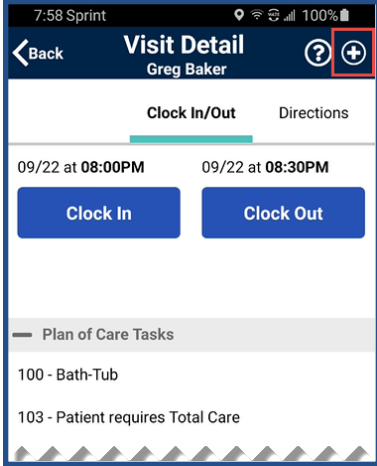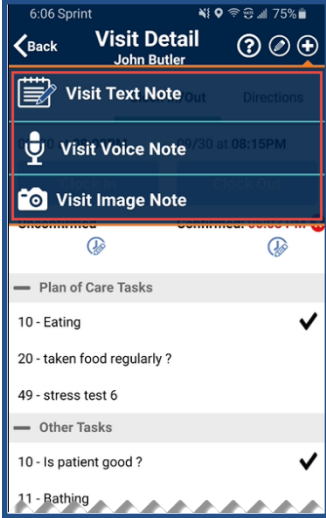
Step	Action
1	When the Visit is completed, tap **Clock Out** on the *Clock In/Out* page. If the Visit included a Plan of Care (POC), the Caregiver is prompted to select the duties performed. Select the **checkmark** for duties performed or the **X** for duties refused. In addition, select the **Refused Duty Reason** (if the Agency requires it) when a duty is marked refused. **Note:**When servicing Mutual Patients, the Caregiver must enter separate POC duties for each Patient. **Enter POC Duties**
2	If the Contract authorizing the Visit requires a Patient Signature, the Caregiver must obtain the signature on the device to process the Visit. **Skip Signature Disabled**

Step	Action
	Patient Signature Required Alert *Note: The **Patient Signature** may be required at Clock In and/or Clock Out depending on the Contract authorizing the Visit. This feature is configured by the Agency.*
3	If the Agency allows the Caregiver to skip the Patient Signature, the Caregiver is prompted to tap ***Skip*** and select the reason why the Patient cannot sign (required). **Skip Signature Enabled Alert** The **Save** button is unavailable until a reason is selected. **Select/Save Skip Reason**
4	Tap ***Save*** when the required screens are completed to return to the *Visit Details* page with a confirmation message (as shown). Tap ***OK*** to return to the home screen. **Clock Out Confirmation**

For standard Clock IN and OUT of *Linked and Mutual Patient Visits*, refer to [Clock In and Out of Linked and Mutual Visits](#).

Visit Notes

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

Step	Action
1	From the **Visit Details** page, tap the ***Add Note*** icon (the circled plus sign), as shown. **Add Note**
2	Select the Note Type: a ***Visit Text Note,*** a ***Visit Voice Note***, or a ***Visit Image Note***. Notes can be reviewed on the *Notes* tab on the **Visit Detail** 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. **Add A Text, Voice, or Image Note**

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.
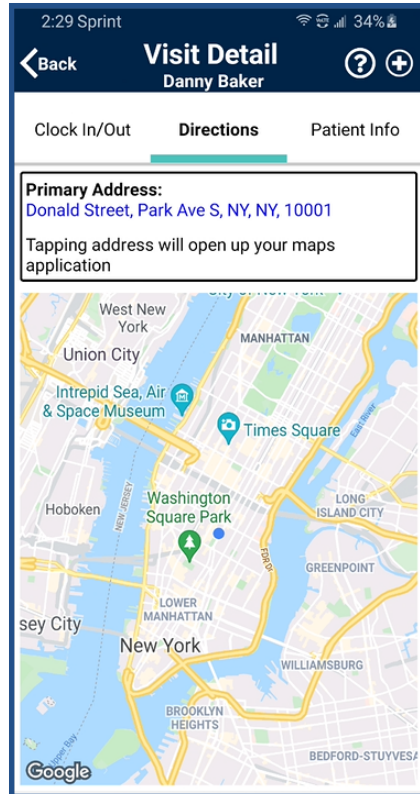
Directions Map: Zoom Out
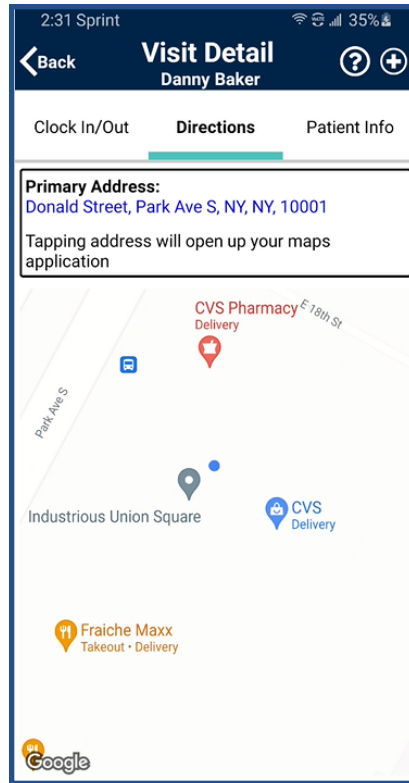
Transportation Routes: Zoom In

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 [icon] at the bottom-left of the screen to display the **Community Visit** checkbox.
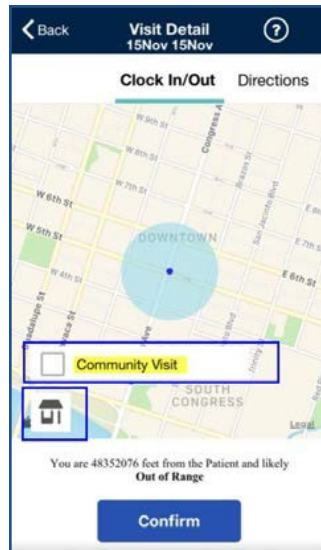
Community Visit Option

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.
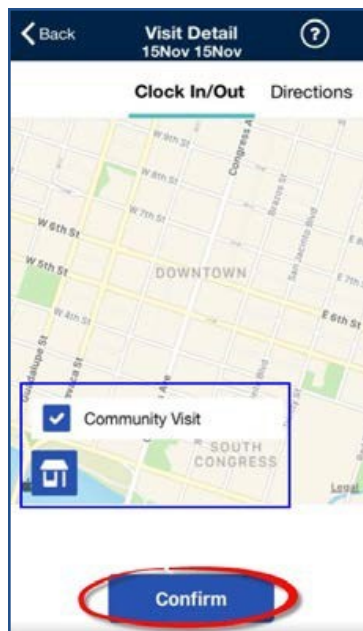
Community Visit Selected

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 Consecutive Shifts.

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.
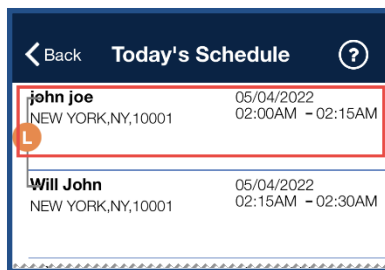
Clock In – Linked Patients

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*.
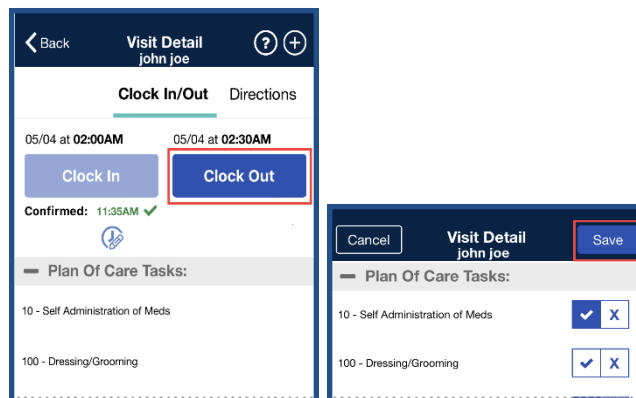
POC for Shift 1

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

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.
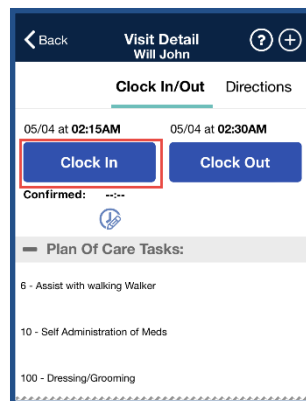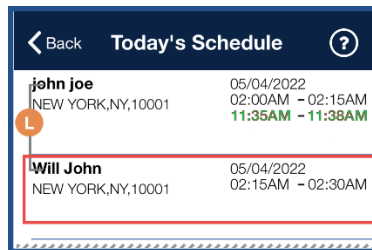
Clock In – Visit 2

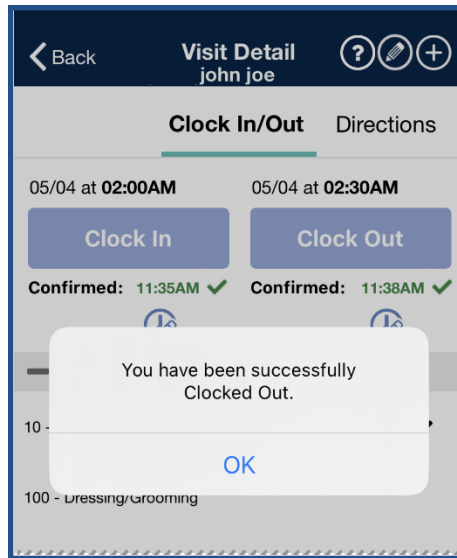To Clock Out, select Visit 2 and tap **Clock Out**.
Upon Clock Out, the Duties screen appears. Complete the duties section for Patient 2 (**Will John**) and tap **Save**.
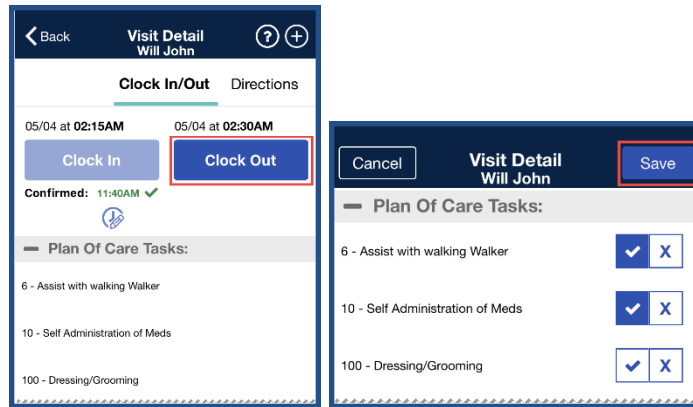
POC for Shift 2

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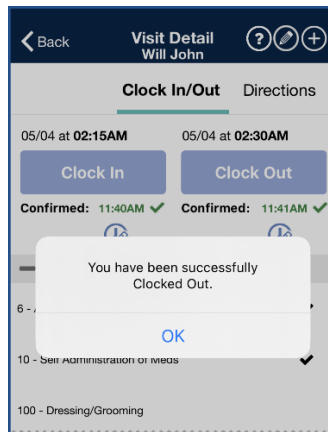
Clock Out – Visit 2

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.
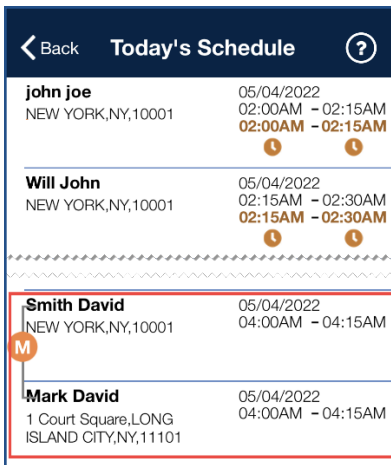
Clock IN - Mutual Visits

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.
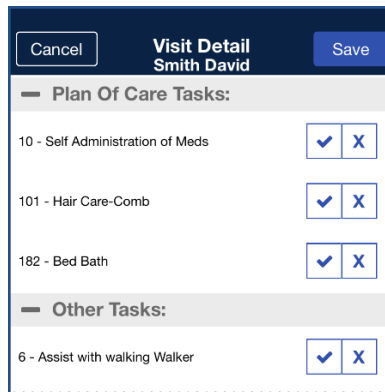
POC – Patient 1

Once complete, both Patients are Clocked Out.
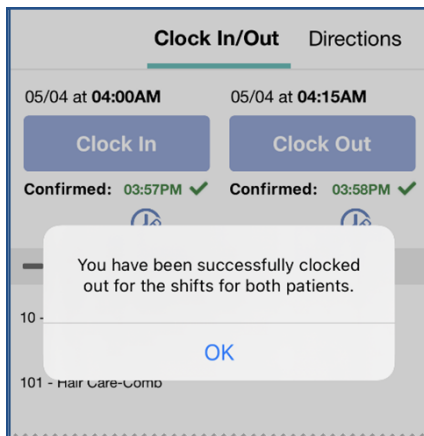
Clock Out Completed

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).
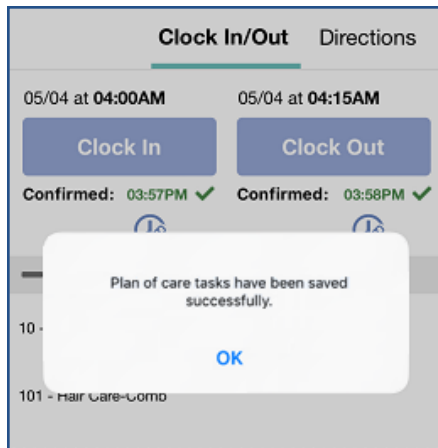
Successful POC Entry

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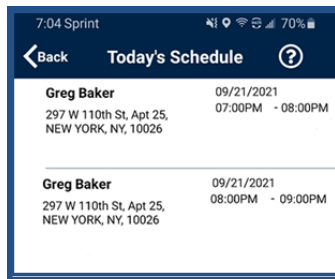
The *Visit Detail* screen opens and shows the Start Time and End Time of the Consecutive Shift sequence (Start time of the first shift and End Time of the last shift in the sequence). Tap ***Clock In*** to begin the Consecutive Shift.

Complete any administrative requirements (if required at Clock-IN, such as Patient Signature with Skip at the start of the shift).
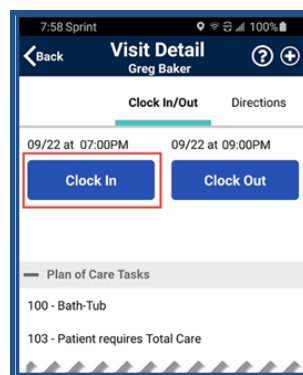
Once Clocked IN, the Confirmed time is presented as the Start time for the Consecutive Shift which is also the start time of the first Visit.
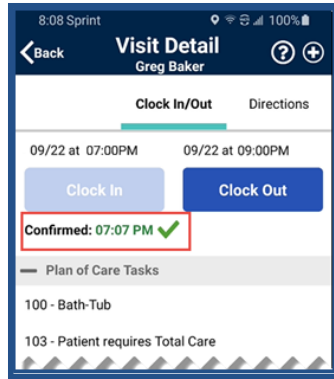
Once all shifts are completed, tap **Clock Out** to end the Consecutive Shift sequence.
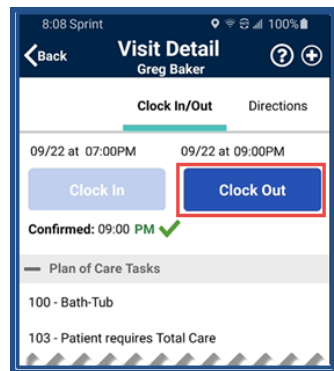
Upon Clock Out, complete all required administrative tasks (as configured by the Agency) that would normally occur on a per shift basis are presented in sequential order (from first to last shift).

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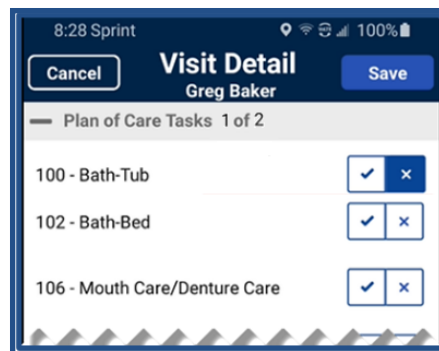
If configured, the *Signature* screen is presented after the POC screen has been completed for all shifts. The signature provided here is used for all the shifts in the Consecutive Shift sequence that require a signature at Clock-OUT.

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.)

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.
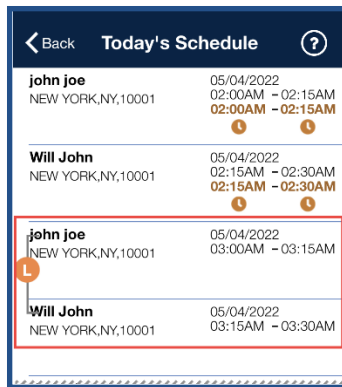
Linked Consecutive Shifts

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.
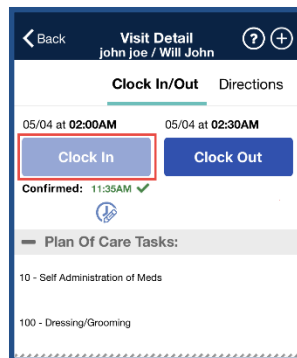
Clock In

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.
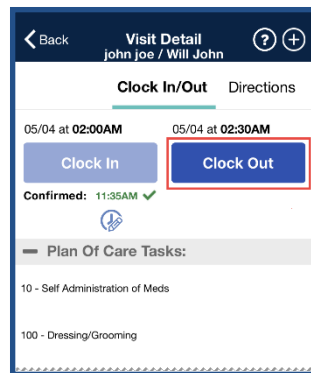
Clock Out

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.

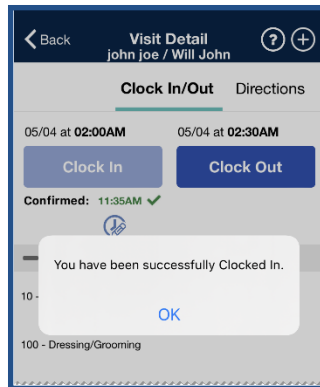Upon Clock Out, complete all required administrative tasks (as configured by the Agency) that would normally occur on a per shift basis are presented in sequential order for each Patient (Patient1/Shift 1, Patient 2/Shift 2).

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.
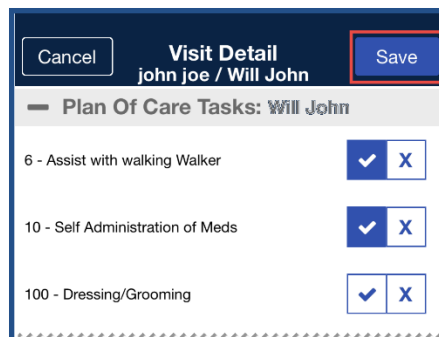
POC Tasks

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**.
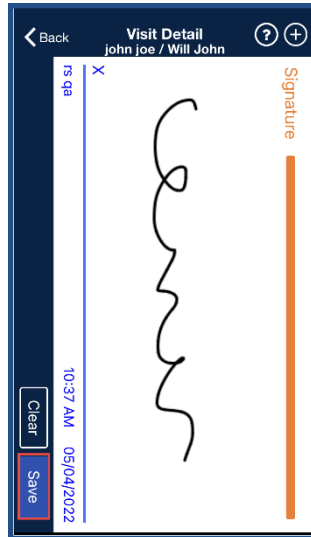
Signature if required

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).

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.
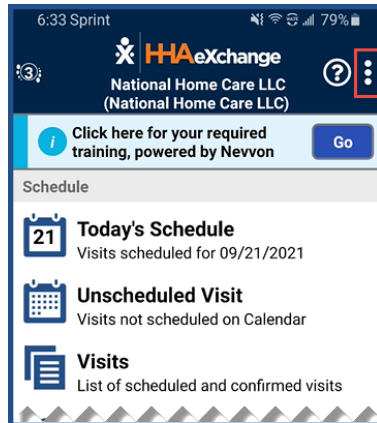
Settings Icon on the Main Screen

Settings Menu

User Guide

Tap the **Help** icon (question mark) to access the Mobile App user guide.
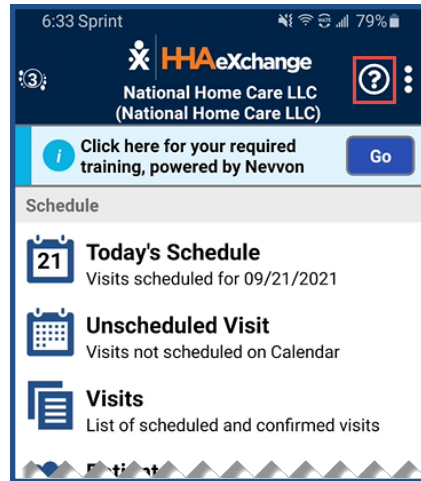
Settings Icon on the Main Screen
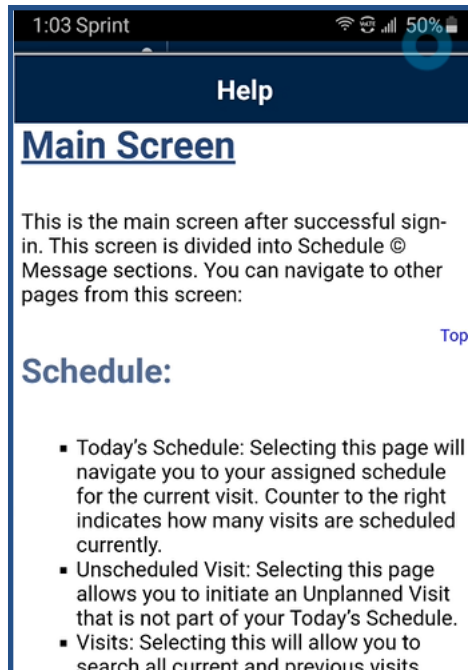
Help Guide
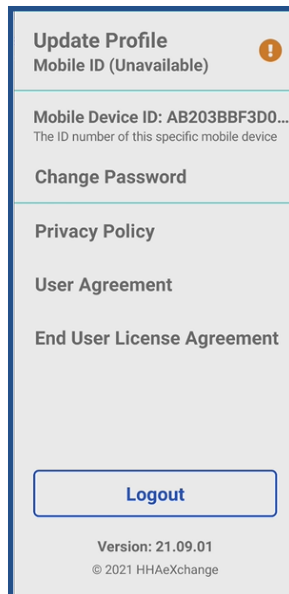
Patient Search

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.
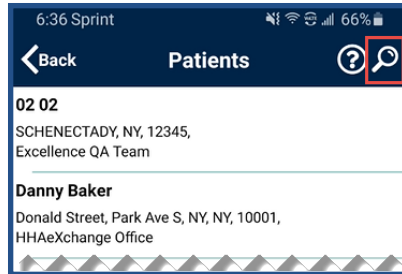
Search Icon on the Patient Page

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
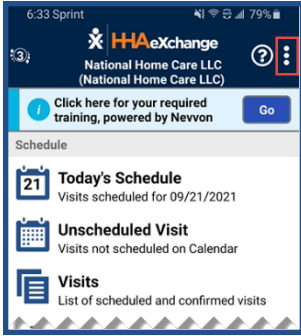
The Mobile App offers language options designed to accommodate Caregivers with their preferred language when using their mobile device.
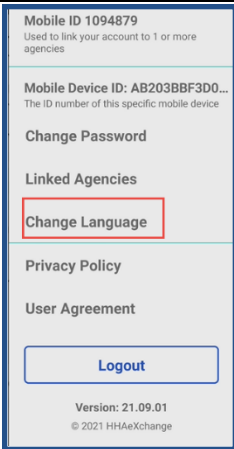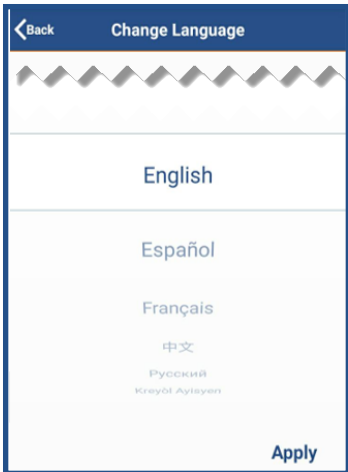
Available languages include:
- English (North America)
- Spanish (Latin America)
- French (European)
- Chinese (Traditional)
- Russian
- Haitian Creole
- Korean
- Albanian
- Arabic
- Armenian
- Bengali
- Polish
- Uzbek
- Vietnamese
- Hmong
- Thai
- Somali
- Cambodian
- Karen (Burmese)
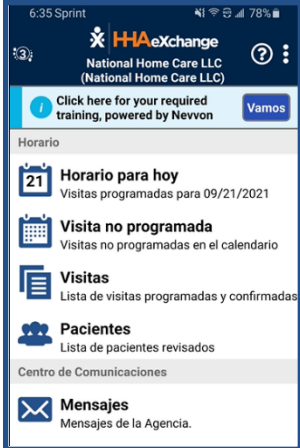
Note: Other languages may be added in future releases.

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

Step	Action
1	Tap the **Options** icon on the top-right, as shown. **Options**
2	From the list of options, select **Change Language**.

Step	Action
	Change Language Option
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. **Select Language** When selected, the screens (headers, instructions, etc.) are translated into the selected language.
4	After selecting the preferred language, all menu items appear in the chosen language. In this example, Spanish was the selected language.

Step	Action
	Language Applied *Note:*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.
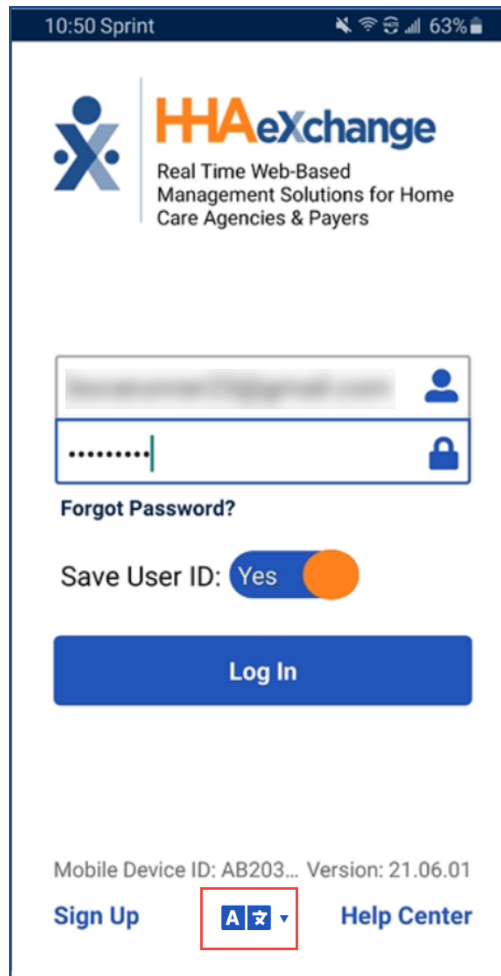
Language Selector icon on Log In page

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.
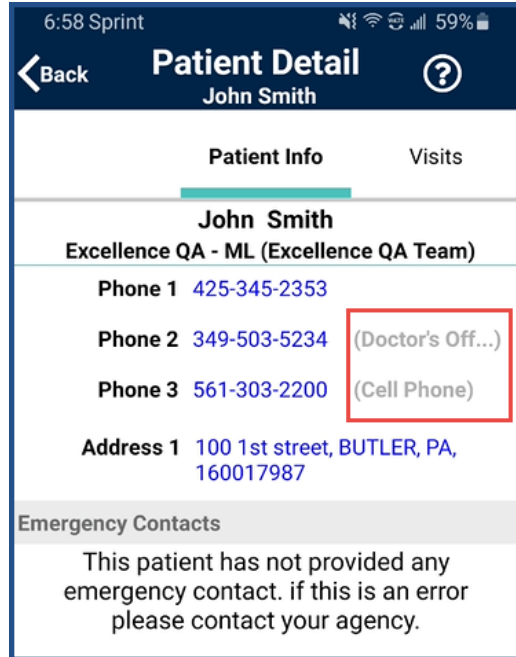
Phone Number Description Labels

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).
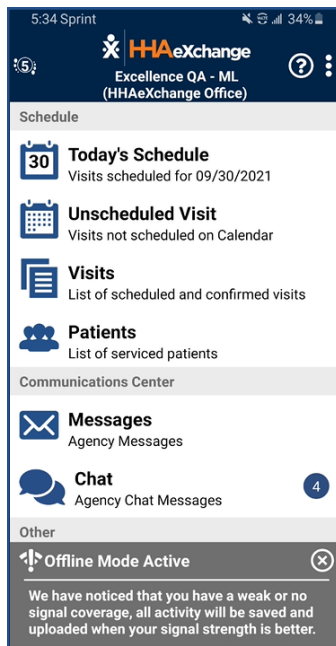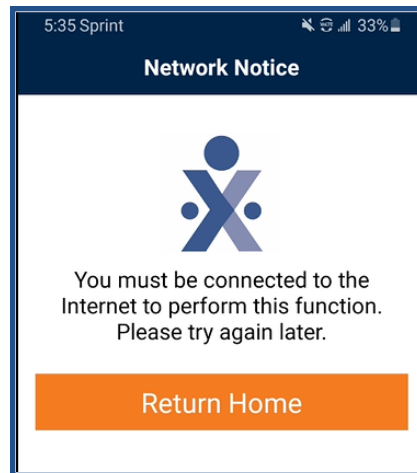

Mobile App Offline Mode Active

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 login before they are prompted to wait three minutes to retry.
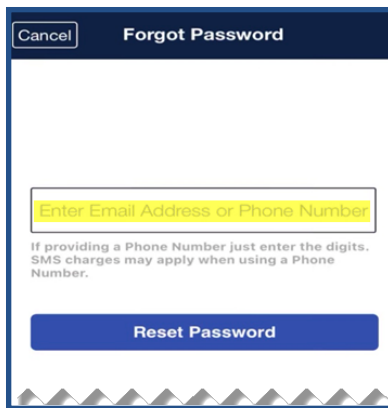
Mobile App Password Reset

Forgot Password?

A Caregiver can reset their own mobile app password directly from the Login screen as shown in the sequence below.
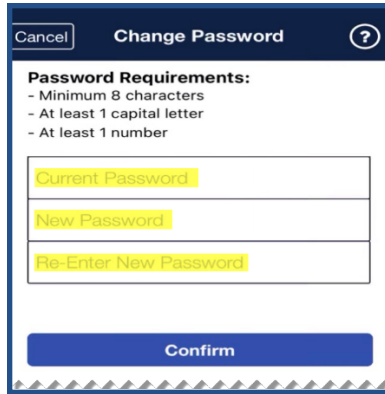
Click on the **Forgot Password?** link.
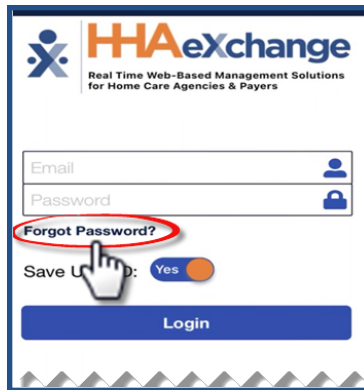
Enter the **Email** or **Phone Number** associated with the account, where a temporary password is sent. Click *Reset Password*.

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.
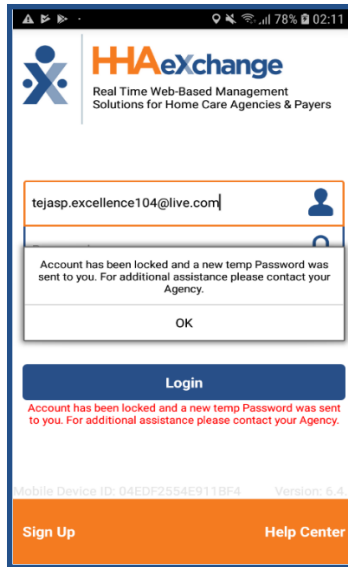
Account Locked

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).
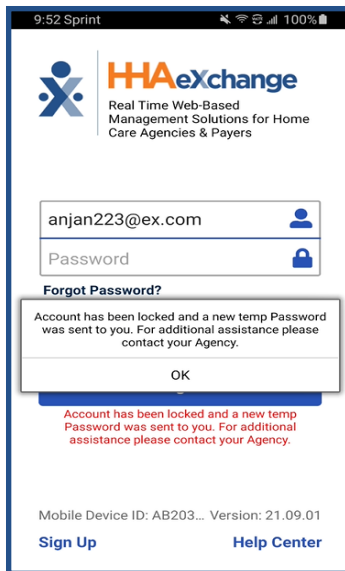
iOS

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 *rejected*, 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.
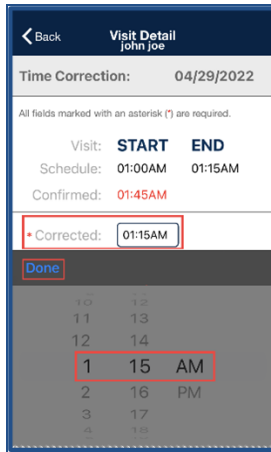
After Clock IN (or Clock Out), the edit icon appears below the Confirmed time. To request an edit, tap the edit icon.
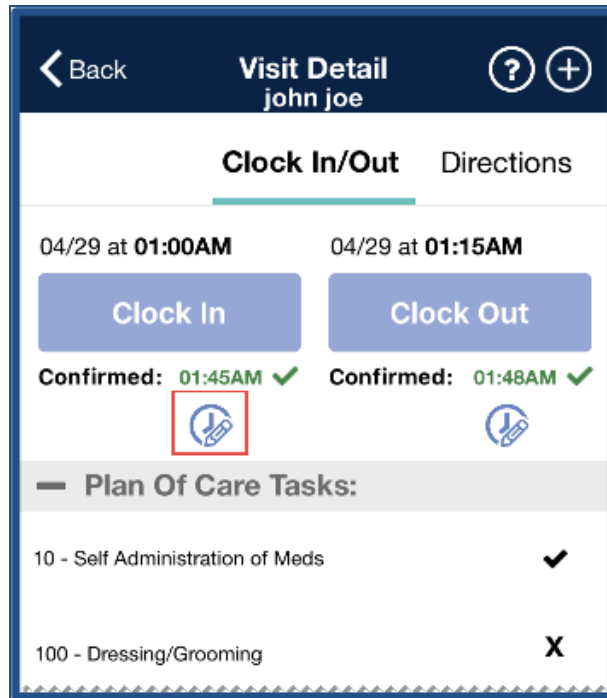
Clock In: Edit Icon Example

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*.

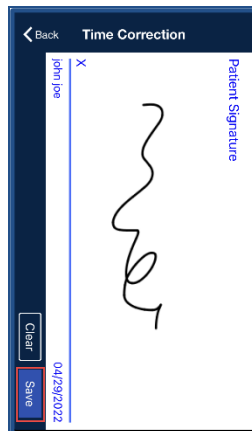**Select Time Correction**

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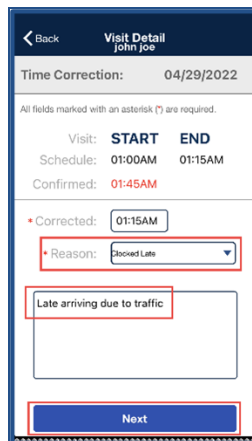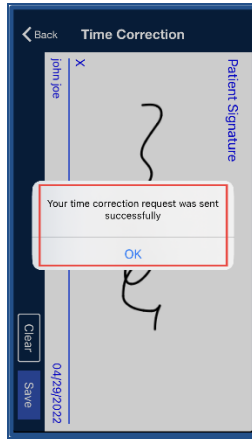

Required Edit Fields

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

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.
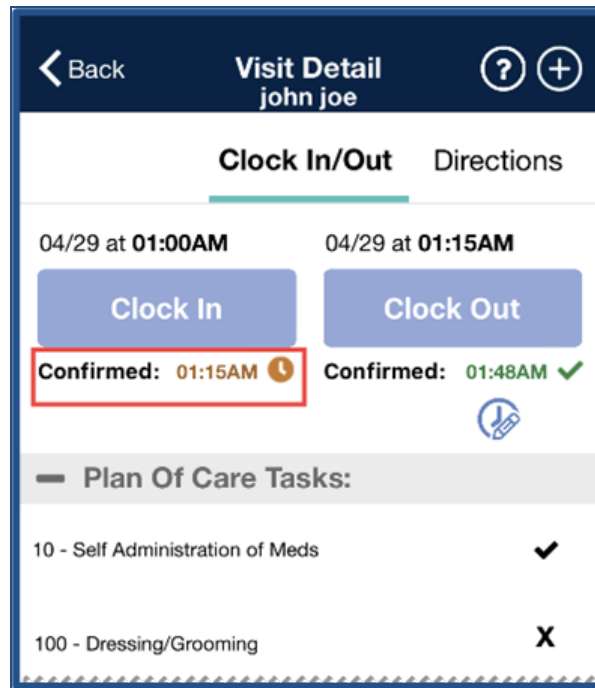
Request Pending

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).
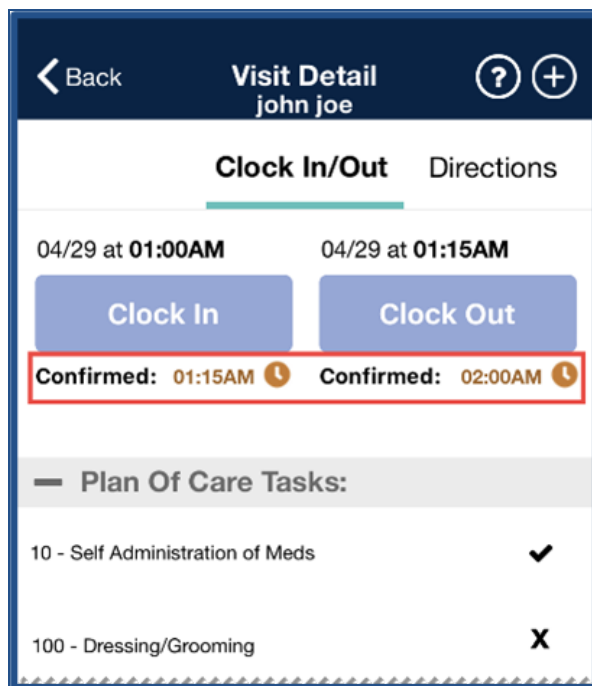
Time Edit Request Pending

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: **HHAX does not change the setting**; 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.*
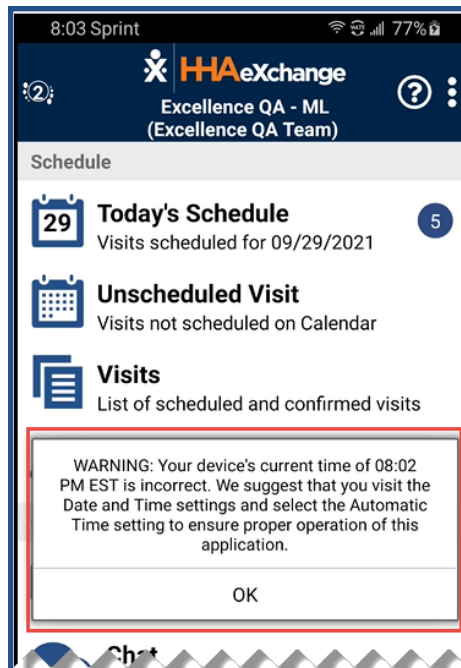
Mobile App Caregiver Compliance Alerts

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).
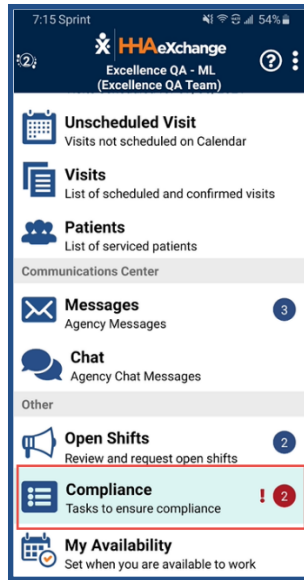
**New Compliance Alert Option**

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.
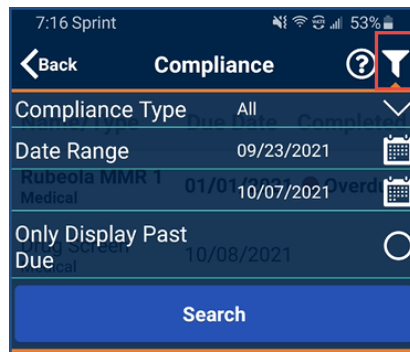

Compliance Screen

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.
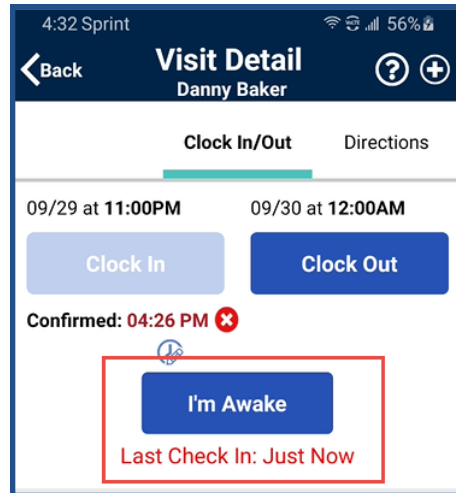
Mobile App: I'm Awake Button

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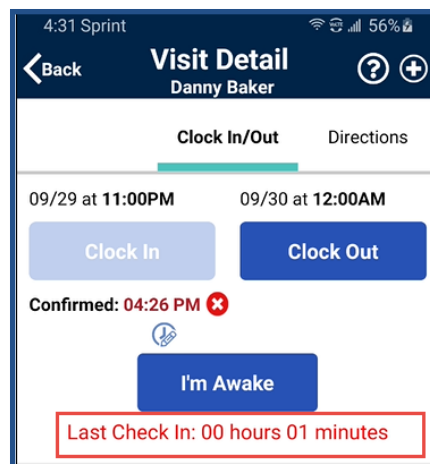
*Note: The Caregiver can periodically check in via the **I'm Awake** button throughout the visit.*

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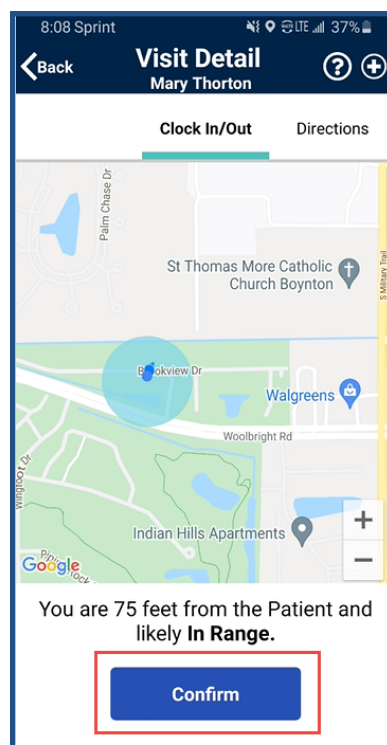
Once the feature is enabled by the Agency, a Caregiver using the GPS EVV method, is presented with a real-time map location relative to the Patient address. This helps them evaluate and approximate to an "In Range" coordinate before confirming a Clock-In or Clock Out.

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.
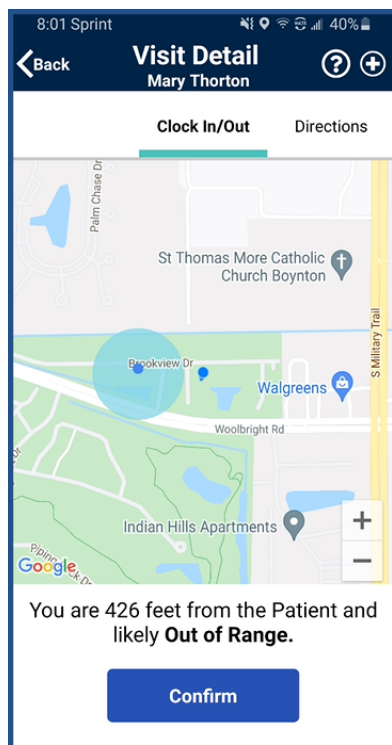

**Mobile App: Out of Range**   **Mobile App: In Range**

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).
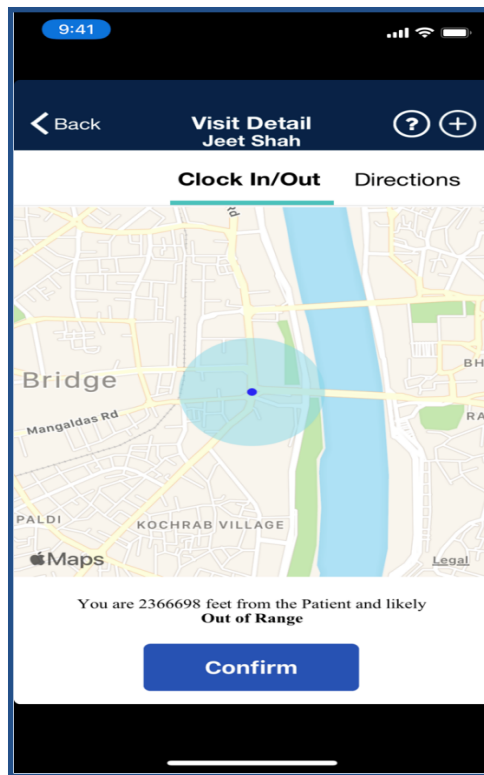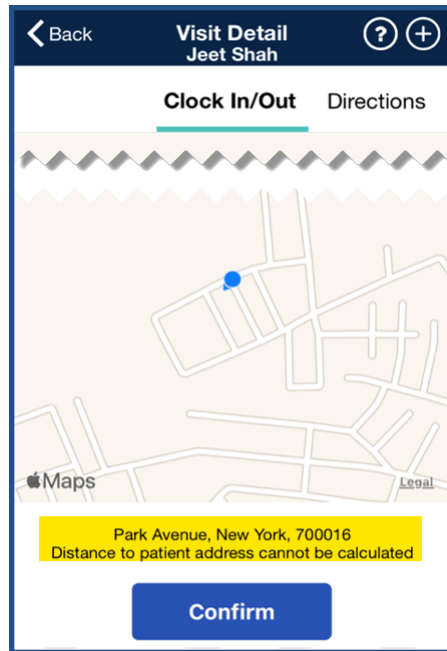

Patient Address with Coordinates
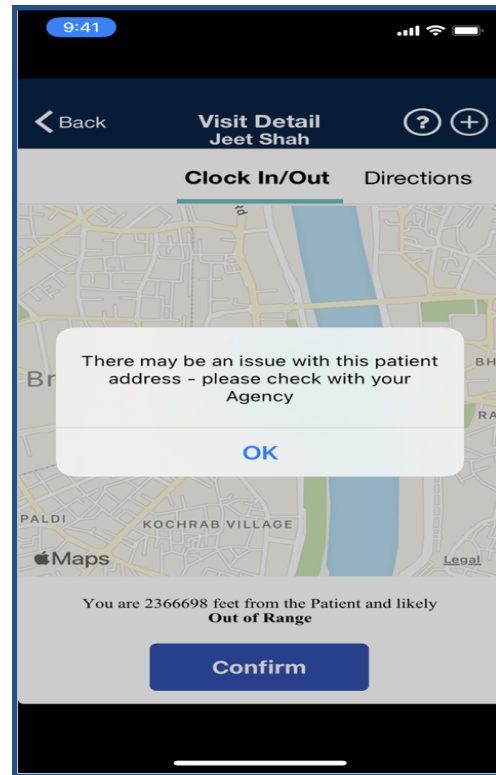
Alert: Issues with Patinet Address

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.

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.
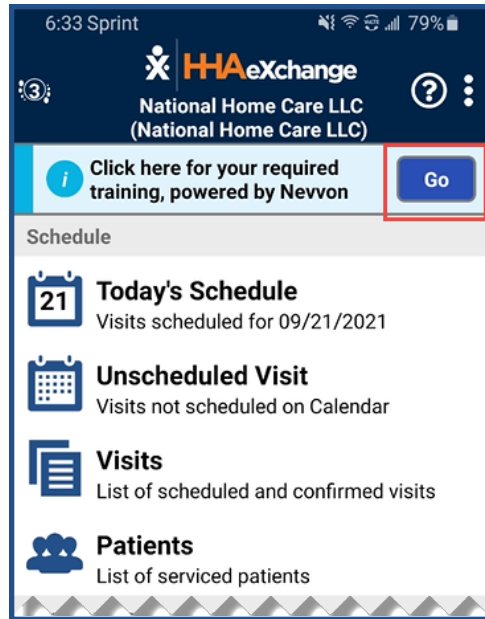
Mobile App: Nevvon Training Banner