



# EVV Management Process Guide

Managing Electronic Visit Verification

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# EVV Management

## Overview

### DISCLAIMER

The EVV feature is activated by System Administration. Please contact [HHAX Support Team](#) for details, setup, and guidance.

**Electronic Visit Verification (EVV)** is a visit confirmation method allowing Caregivers to Clock-In and Out of visits from the Patient’s home. EVV provides reliable time confirmations and helps to verify that the Caregiver is physically with the Patient when Clocking-In and Out.

This guide covers how to **Set Up EVV**, **Review Successful EVV Information**, and **Manage Unsuccessful EVV**.

Please direct any questions, thoughts, or concerns regarding the content herein to [HHAeXchange Customer Support](#).

## HHAX System Key Terms and Definitions

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

Term	Definition
<b>Patient</b>	Refers to the Member, Consumer, or Recipient. The Patient is the person receiving services.
<b>Caregiver</b>	Refers to the Aide, Homecare Aide, Homecare Worker, or Worker. The Caregiver is the person providing services.
<b>Provider</b>	Refers to the Agency or organization coordinating services.
<b>Payer</b>	Refers to the Managed Care Organization (MCO), Contract, or HHS. The Payer is the organization placing Patients with Providers.
<b>HHAX</b>	Acronym for HHAeXchange

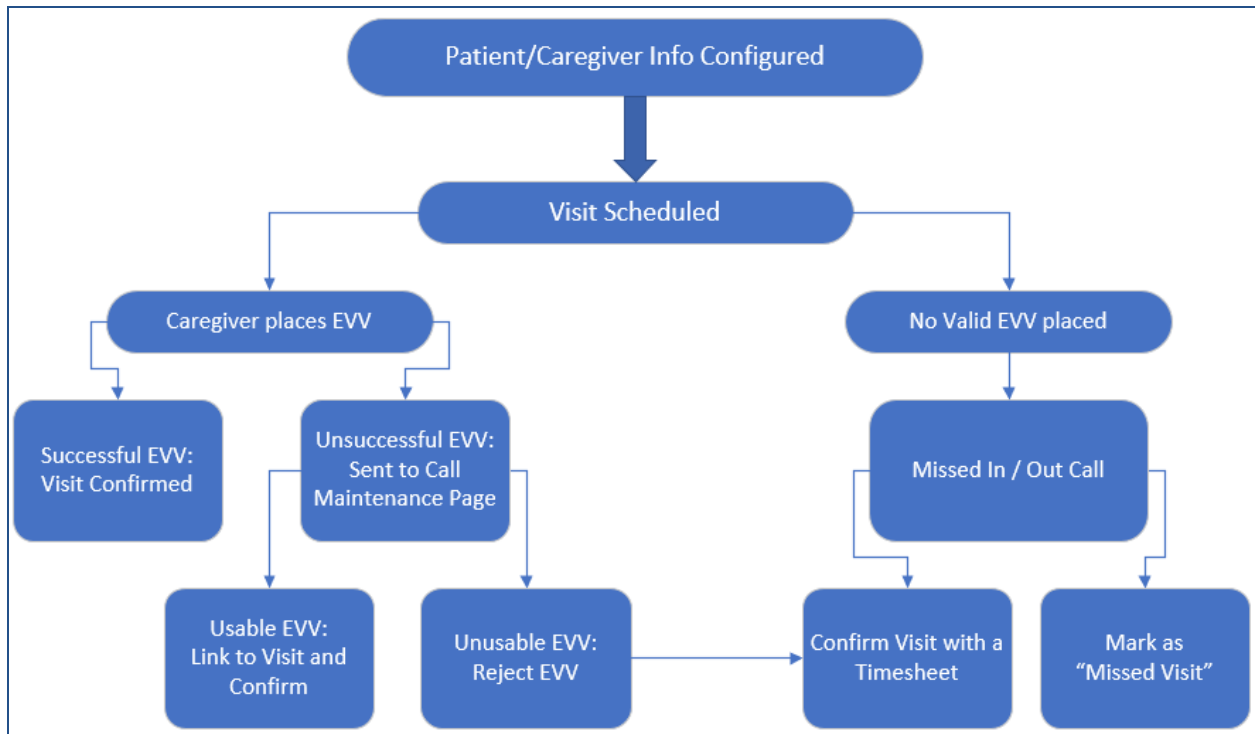
## EVV Specific Terms

The following EVV-specific terms that are used within this document.

Term	Definition
<b>Caller ID</b>	Refers to IVR/Telephony
<b>Call</b>	Refers to any logging of EVV.

## EVV Process Flow

The flowchart below illustrates the process flow on how EVV works in the HHAExchange (HHAX) system.



**Note:** Some Agencies may have their own internal policies for EVVs and manual visit updates. Please ensure to check with your Agency's Compliance Officer to confirm internal practices and procedures.

# EVV Configuration

**Tip:** Press the **Ctrl-F** keys to search this topic.

Agencies must determine the functional parameters of EVV confirmation and properly manage information and settings on *Patient* and *Caregiver* Profiles. This ensures proper usability and success of EVV.

## Agency Setup

EVV confirmation may be made using Caller ID, GPS, or FOB codes. Each method must be activated and set up manually by the Agency on the **Agency Profile** and **Office Setup** pages.

## Agency Profile

Navigate to **Admin > Agency Profile** to setup EVV configuration at the Agency level. The system stores up to 3 unique phone numbers for every Patient. On the **Accept Time and Attendance Call From** field determine which of these phone numbers is to be used for Caller ID-based EVV.



\* Accept Time and Attendance Call From:  Home Phone  Phone 2  Phone 3 ⓘ

Accept Time and Attendance Call

## Office Setup

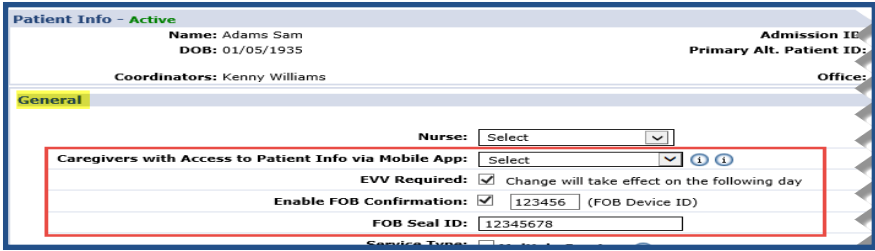
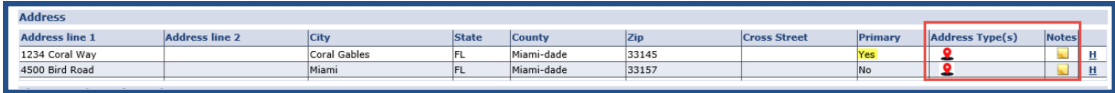
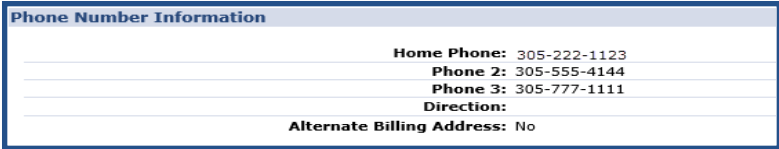
Navigate to **Admin > Office Setup** to setup EVV configuration at the Office level as described in the table below.

Field	Description (This allows...)
<b>Mobile GPS Visit Verification /Tolerance Range (ft)</b>	<p>Caregivers to place EVVs using the Mobile App. The <b>Tolerance Range (ft)</b> refers to the acceptable distance range a Caregiver can make a valid EVV from.</p> <p>If the <b>Tolerance Range</b> is set to 100 feet, the Caregiver can successfully place an EVV via GPS within 100 feet of the Patient’s address based on the address’s coordinates.</p> <div data-bbox="558 772 1362 842" style="border: 1px solid black; padding: 5px;"> <p>* Mobile GPS Visit Verification: <input checked="" type="checkbox"/> Tolerance Range (ft): <input type="text" value="100"/> ⓘ</p> </div>
<b>Mobile Fixed Visit Verification</b>	<p>Caregivers to enter FOB codes using the Mobile App.</p> <div data-bbox="732 911 1190 980" style="border: 1px solid black; padding: 5px; text-align: center;"> <p>Mobile Fixed Visit Verification: <input type="checkbox"/> ⓘ</p> </div> <p style="text-align: center;"><b>Mobile Fixed Visit Verification</b></p>
<b>Unbalanced Tolerance</b>	<p>To set a window for Caregivers to place a linkable EVV. For example, if the <b>Unbalanced Tolerance</b> is set to 15 minutes, then the Caregiver has 15 minutes from the scheduled start time of the visit to place an EVV. If they attempt to place one outside of this window, the EVV will not link to the visit.</p> <div data-bbox="670 1215 1252 1285" style="border: 1px solid black; padding: 5px; text-align: center;"> <p>UnBalanced Tolerance: Hours <input type="text" value="0"/> Min <input type="text" value="15"/> ⓘ</p> </div> <p style="text-align: center;"><b>Unbalanced Tolerance</b></p>



## Patient Setup

When a Caregiver Clocks In or Out, the system verifies the EVV based on information maintained on the Patient's *General* and *Profile* pages. Follow the steps below to enter and maintain Patient confirmation information.

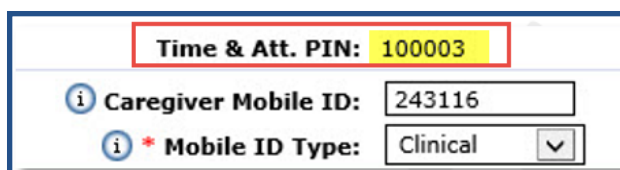
Step	Action																														
1	Navigate to <b>Patient &gt;General</b> and select the <b>Edit</b> button.																														
2	<p>The EVV settings are in the <i>General</i> section as illustrated in the image below and described in the table underneath.</p>  <p style="text-align: center;"><b>EVV Setup in Patient General Page</b></p> <ul style="list-style-type: none"> <li>The <b>EVV Required</b> checkbox is automatically selected when a <i>Referral</i> converted to a <i>Patient</i>.</li> <li>Select the <b>Enable FOB Confirmation</b> checkbox if the Patient uses an FOB device. Enter the required <b>FOB Device ID</b> and <b>FOB Seal ID</b> fields (if this option is selected). The Caregiver must enter the Device ID each time an EVV is entered.</li> <li>The <b>Caregiver with Access to Patient Info via Mobile App</b> dropdown field contains the names of Caregivers who use the Mobile App and have been configured to view clinical information from it. Select one or more Caregivers to grant them access to the Patient's clinical info.</li> </ul>																														
3	Select the Patient's <i>Profile</i> page (from the left nav) and go to the <i>Address</i> section.																														
4	<p>Complete the Patient's demographic information. Multiple Addresses can be entered for a Patient as a GPS-enabled <b>Address Type</b> (as seen in the image). Verify that all addresses are accurate, as the system uses these values to validate EVV confirmations.</p>  <p style="text-align: center;"><b>Patient Profile GPS Enabled Patient Addresses</b></p> <table border="1"> <thead> <tr> <th>Address line 1</th> <th>Address line 2</th> <th>City</th> <th>State</th> <th>County</th> <th>Zip</th> <th>Cross Street</th> <th>Primary</th> <th>Address Type(s)</th> <th>Notes</th> </tr> </thead> <tbody> <tr> <td>1234 Coral Way</td> <td></td> <td>Coral Gables</td> <td>FL</td> <td>Miami-dade</td> <td>33145</td> <td></td> <td>Yes</td> <td>GPS</td> <td>H</td> </tr> <tr> <td>4500 Bird Road</td> <td></td> <td>Miami</td> <td>FL</td> <td>Miami-dade</td> <td>33157</td> <td></td> <td>No</td> <td>GPS</td> <td>H</td> </tr> </tbody> </table>	Address line 1	Address line 2	City	State	County	Zip	Cross Street	Primary	Address Type(s)	Notes	1234 Coral Way		Coral Gables	FL	Miami-dade	33145		Yes	GPS	H	4500 Bird Road		Miami	FL	Miami-dade	33157		No	GPS	H
Address line 1	Address line 2	City	State	County	Zip	Cross Street	Primary	Address Type(s)	Notes																						
1234 Coral Way		Coral Gables	FL	Miami-dade	33145		Yes	GPS	H																						
4500 Bird Road		Miami	FL	Miami-dade	33157		No	GPS	H																						
5	<p>For other forms of EVV, the Patient Phone Number(s) is used to confirm an EVV. Verify the Phone Number Information on the Patient Profile.</p>  <p style="text-align: center;"><b>Phone Number Information</b></p> <p>Home Phone: 305-222-1123          Phone 2: 305-555-4144          Phone 3: 305-777-1111          Direction:          Alternate Billing Address: No</p>																														

Step	Action
	<p align="center"><b>Patient Profile – Patient Phone Number Information</b></p> <p>Refer to the <a href="#">Tracking Location Where EVV is Performed</a> topic for full details on linking a Patient Phone Number to an EVV method.</p>

## Caregiver Setup

Caregivers must enter their **Time & Attendance PIN (Assignment ID)** to verify their identity whenever placing an EVV (using an approved phone). This allows the system to match up their call with the proper visit.

EVVs made via the Mobile App require a **Mobile ID** verification number, issued when a Caregiver creates a profile on the Mobile App. Caregivers must provide this **Mobile ID** to the Agency to link with the system. Once the Agency enters the ID on the Caregiver’s **Profile** page, the system recognizes EVVs placed from the Caregiver’s Mobile App.



The screenshot shows a form with three fields:

- Time & Att. PIN:** 100003 (highlighted in yellow)
- Caregiver Mobile ID:** 243116
- Mobile ID Type:** Clinical (dropdown menu)

Caregiver PIN and Mobile ID (Assignment ID)

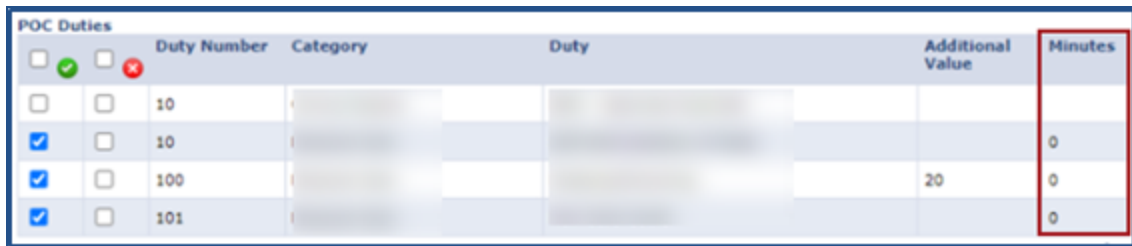
Once the **Caregiver Mobile ID** has been entered, the system requires a **Mobile ID Type**. Select *Clinical* to allow the Caregiver to review the Patient’s medical and clinical information if they have been granted access to this information. The Caregiver cannot view any medical or clinical if *Non-Clinical* is selected.

# Non-EVV Configuration

**DISCLAIMER**

This feature is activated by HHAX System Administration. Please contact [HHAX Support Team](#) for details, setup, and guidance.

In cases of Non-EVV, Caregivers can log Non-EVV (non-billable) visit duration (in hours), based on a Duty Code created via HHAX System Administration. Once enabled, Caregivers can select the code from their Mobile App and enter Non EVV visit duration time. Thereafter, Providers can manually adjust the Non-EVV time (in minutes) for the visit in the Visit Info tab, under the POC Duties section (as seen in the following image).



POC Duties		Duty Number	Category	Duty	Additional Value	Minutes
<input type="checkbox"/>	<input checked="" type="checkbox"/>					
<input type="checkbox"/>	<input type="checkbox"/>	10				
<input checked="" type="checkbox"/>	<input type="checkbox"/>	10				0
<input checked="" type="checkbox"/>	<input type="checkbox"/>	100			20	0
<input checked="" type="checkbox"/>	<input type="checkbox"/>	101				0

Visit Info Tab: POC Duties

Once enabled, Caregivers can select the code from their Mobile App and enter Non EVV time.

On the Provider system, the Non EVV Time duty appears under the *POC Duties* section in the *Visit Info* tab. From here Providers can adjust the minutes for Non EVV.

A system validation is now in place alerting Providers that these adjustments are not reflected as Billed Hours. Billing Hours are only affected based on what the Caregiver enters as Non-EVV time.

# Placing an EVV

EVV may be placed using an approved Patient phone, the HHAeXchange Mobile App, or with an FOB device. This section covers each method of placing an EVV.

## Caller ID

When Clocking In or Out by phone, the Caregiver must dial the Provider’s Time and Attendance phone number. When the call is placed, the system reviews the number the call is originating from and matches it with an accepted Patient phone number. If the system cannot match the number from the Caller ID, the call is sent to the **Call Maintenance** Exception page.

The following steps provide an example of how a Caregiver performs a Caller ID type of EVV.

Step	Action
1	At the beginning of a shift, the Caregiver uses the approved Patient’s phone to dial the Provider’s <b>Time and Attendance</b> phone number.
2	Enters “1” to Clock In.
3	The system then prompts the Caregiver to enter their <b>Time and Attendance Pin</b> (found in the Caregiver Profile).
4	The system confirms the entry and ends the call.
5	At the end of the shift, the Caregiver again uses the approved Patient’s Phone to dial the <b>Time and Attendance</b> phone number.
6	Enters “2” to Clock Out.
7	The system then prompts the Caregiver to enter their <b>Time and Attendance Pin</b> a second time.
8	The system prompts the Caregiver to enter the duties performed for the Visit. The system automatically registers the entry when a recognized <b>Duty ID</b> code is entered. If a Duty is refused, the Caregiver enters star “*” before the <b>Duty ID</b> code.
9	After entering all duties, the Caregiver enters “000”. The system confirms the entry and ends the call.

**Note:** In special cases (such as Linked/Mutual cases), the system may prompt for multiple sets of duties. After each set is logged, the Caregiver enters “00” (or “000”) to move to the next set.

## FOB Device

The **Fixed Object (FOB)** is a small device used for EVV that generates an **8-digit passcode** which must be entered when a Caregiver Clocks In and Out.

In addition to the passcode, the FOB's **Device ID** must be entered to place EVV. The FOB EVV requires a specific **Device ID** and two codes (one for Clock In; another for Clock Out). With this option, Caregivers may place EVV from any phone. Refer to the [FOB category](#) for further information on the FOB device.

The following steps provide an example of how a Caregiver performs an FOB Device type of EVV.

Step	Action												
1	The Caregiver activates the FOB at the beginning and end of the Visit, recording the 8-digit passcode each time.												
2	The Caregiver calls the Provider's Time and Attendance phone number and presses "3" to indicate "FOB Device" confirmation.												
3	The Caregiver presses "3" a second time to indicate "FOB Clock In and Clock Out."												
4	As prompted, The Caregiver then enters the following: <table border="1" data-bbox="412 1039 1130 1283" style="margin-left: 40px;"> <thead> <tr> <th>Step</th> <th>Enter</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Time &amp; Attendance Pin</td> </tr> <tr> <td>2</td> <td>6-Digit Device ID</td> </tr> <tr> <td>3</td> <td>8-Digit Clock In passcode</td> </tr> <tr> <td>4</td> <td>8-Digit Clock Out passcode</td> </tr> <tr> <td>5</td> <td>Any duties performed (one at a time)</td> </tr> </tbody> </table>	Step	Enter	1	Time & Attendance Pin	2	6-Digit Device ID	3	8-Digit Clock In passcode	4	8-Digit Clock Out passcode	5	Any duties performed (one at a time)
Step	Enter												
1	Time & Attendance Pin												
2	6-Digit Device ID												
3	8-Digit Clock In passcode												
4	8-Digit Clock Out passcode												
5	Any duties performed (one at a time)												
5	With the duties entered, the Caregiver dials "000" to end the call.												

**Note:** FOB confirmations can also be placed from the HHAExchange Mobile App. Refer to the [Mobile App Caregiver category](#) for instructions for this process.

## Mobile App

The **Mobile App** may be used to place EVV with an FOB device or with the GPS functionality.

The **Mobile ID** is generated when the Caregiver signs up for the Mobile App. This Mobile ID is provided from the Caregiver and entered in the Caregiver Profile in the HHAX system (refer to the [Caregiver Setup](#) section in EVV Configuration).

HHAX uses Google Maps to determine the GPS coordinates of the address entered in the **Address 1** field. Verify that the address entered for the Patient **Address 1** field (on the Patient *Profile* page) is correct.

*Note: Supplementary information, such as the Patient's apartment number or cross street, may be entered in the **Address 2** field (not used for GPS validation purposes).*

The following steps provide an example of how a Caregiver performs EVV via the Mobile App.

Step	Action
1	Log in to the Mobile App at the beginning of the Visit.
2	Select <b>Today's Schedule</b> from the main menu and then select the Patient.
3	Select <b>Clock In</b> .
4	Select the Visit verification method: <b>GPS</b> or <b>Security Token (FOB)</b> <ul style="list-style-type: none"> <li>• When the <b>GPS</b> function is used to place EVV, the system validates the coordinates of the EVVs point of origin against the coordinates on record for the Patient. If the coordinates of the EVV match the Patient's address or fall within the specified <b>Tolerance Range</b>, then the system confirms the visit.</li> <li>• For <b>FOB</b>, the Caregiver is prompted to enter the <b>Device ID</b> and the 8-digit passcode.</li> </ul>
5	At the end of the Visit, repeat <i>Step 1</i> , <i>Step 2</i> , <i>Step 3</i> , and <i>Step 4</i> , with the addendum that <b>Clock Out</b> is selected on <i>Step 3</i> .
6	Lastly, enter the POC duties performed and select <b>Save</b> to finalize.

Refer to the [Mobile App Caregiver category](#) for further information when placing EVV via the Mobile App.

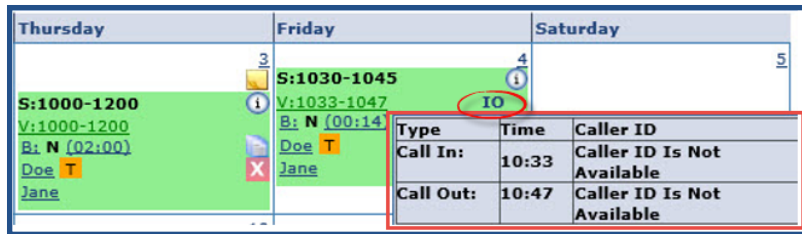
- Refer to the **Alternate EVV System Verification Configuration and Reporting** section of the guide for additional verification alternatives.

# Caregiver Places a Successful EVV

When a Caregiver places a **Successful EVV**, the system immediately updates the visit to reflect the verification. Successful EVV confirmations can be reviewed in several areas of the system as outlined below.

## Option 1

On the Patient's *Calendar* page, confirmation times display in the Calendar Cell (as illustrated in the image below).



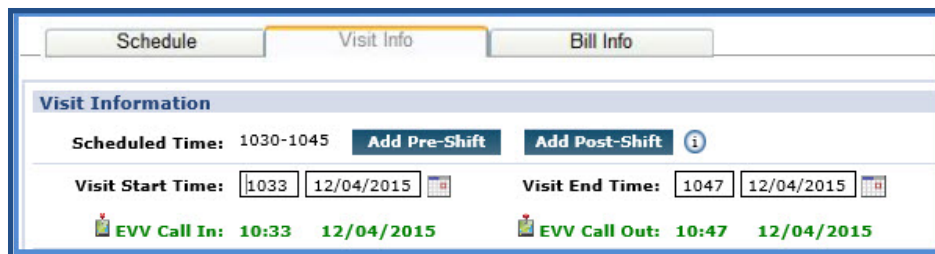
In and Out Times

**Note:** The **Caller ID** is not available in the image above because the EVV was placed using the Mobile App. The **I** and **O** icons in the image above (Friday the 4<sup>th</sup>) mark accepted EVVs for the In and/or Out time. Hovering the cursor over the icon opens a pop-up containing the precise times of the EVVs, as well as the Caller ID.

For manually confirmed visit times (start/end), the times are displayed without the **I** and **O** icons.

## Option 2

In the *Visit Info* tab of the visit window, specific EVV confirmation details and sources are reviewed. EVV confirmations display in green under the **Visit Start Time** and **Visit End Time** fields. As illustrated in the image below, a small icon to the left of the EVV confirmations indicates that the GPS method was used to place the EVV.



GPS Confirmation on the Visit Info Tab

At the bottom of the *Visit Info* tab, the *Call History* section provides details of the EVV history placed for the visit.

Call History								
EVV Time	EVV Type	Status	Duration	Tasks Performed	CallerID	Linked By	Linked Date	Unlink
12/04/2015 10:47 AM	GPS Out (Doe Jane )	Success	0		N/A	jfranqui	12/04/2015 12:25 PM	<a href="#">Unlink Call</a>
12/04/2015 10:32 AM	GPS In (Doe Jane )	Linked Manually	0		N/A	jfranqui	12/04/2015 12:24 PM	<a href="#">Unlink Call</a>
12/04/2015 10:32 AM	Verification	Auto Verification (Call Maintenance)	0		N/A	jfranqui	12/04/2015 12:24 PM	

Call History on the Visit Info Tab



## Caregiver Places an Unsuccessful EVV

When a Caregiver places an **Unsuccessful EVV**, the system rejects the confirmation and sends it to the **Call Dashboard**. An Unsuccessful EVV may be the result of any of the following:

- The Caregiver using an unauthorized phone to place the EVV.
- The Caregiver is outside the tolerance range when placing a GPS EVV.
- The Caregiver places the EVV outside the unbalanced tolerance window.

There are only two outcomes for calls sent to the **Call Dashboard**:

1. **Link** calls that were made but never applied to a Visit.
2. **Reject** calls that cannot be matched to any Visits.

---

## The Call Dashboard

**Tip:** Press the **Ctrl-F** keys to search this topic.

The **Call Dashboard** is used to capture and track EVV failures and rejections (as described in the section above).

There are only two outcomes for calls sent to the **Call Dashboard**:

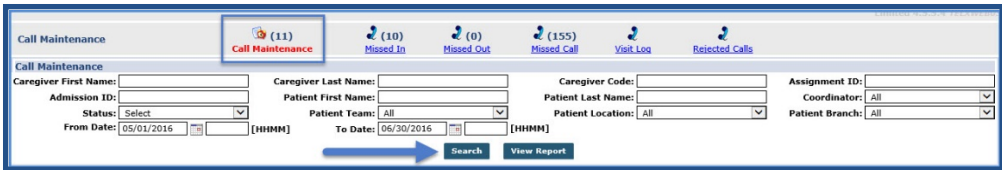

- **Link** calls that were made but never applied to a visit.
- **Reject** calls that cannot be matched to any visits.

This section covers the **Call Dashboard**, linking calls, and rejecting calls pages.

**Note:** *This topic provides the general steps to review exceptions, link calls, and reject calls. Managing individual exceptions and polices is the responsibility of each individual Agency. Refer to the [Call Dashboard Resolutions](#) topic for steps in managing various other exceptions.*

## Call Maintenance

The **Call Maintenance** is a real-time hub for tracking and reviewing Caregiver time and attendance. In this hub, EVV that cannot be matched to a Visit is reviewed and held. All EVV held on this page is assigned a **Status**, such as *Call from Caregiver Number* or *Phone Number Not Found*, which corresponds to the reason the EVV was held. Complete the following steps to review EVV “held” on the **Call Maintenance** page.

Step	Action
1	Navigate to <b>Visit &gt; Call Dashboard</b> to access the <i>Call Maintenance</i> page.
2	<p>Click <b>Search</b> to access the following:</p> <ul style="list-style-type: none"> <li>all “held” EVV on the <i>Call Maintenance</i> page (leaving search filters blank); or</li> <li>specific EVV based on search criteria using the available filters such as <b>Status</b>, <b>Coordinator</b>, or <b>From/To Date</b>.</li> </ul>  <p style="text-align: center;"><b>Call Maintenance Filters</b></p>
3	<p>Results are generated. Each line item is an EVV that could not be “matched” with a scheduled visit. Items in each row have three main components, as highlighted in the image and described in the table below.</p>  <p style="text-align: center;"><b>Unlinked Calls</b></p> <ul style="list-style-type: none"> <li>Columns highlighted in <b>RED</b> indicate the Caregiver placing the confirmation. Information is based on the <b>Time and Attendance PIN</b> of the Caregiver placing the EVV confirmation.</li> <li>Columns highlighted in <b>BLUE</b> indicate <b>Call details</b> captured by the EVV including the Patient, Call Date and Time, Call Type (In or Out), and the Caller ID used.</li> <li>Columns highlighted in <b>ORANGE</b> indicate the reason why the Caregiver’s EVV was not automatically linked to a scheduled visit.</li> </ul>
4	Click on the <b>Caregiver Name</b> (link) to view the <b>Caregiver’s</b> scheduled visits for the day. Visit details display in a popup (as illustrated).

Step	Action																																																	
	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Caregiver Code</th> <th>Caregiver Name</th> <th>Caregiver Phone</th> <th>Caregiver Team</th> <th>Patient Name</th> <th>Call Date</th> <th>Call Time</th> <th>Call Type</th> <th>Caller ID</th> </tr> </thead> <tbody> <tr> <td>1022</td> <td>Hancher Stuart</td> <td>Phone1 : 666-777-6666 Phone2 :</td> <td></td> <td></td> <td>08/25/2015</td> <td>16:03</td> <td>IN H</td> <td>666-777-6666</td> </tr> <tr> <td colspan="9" style="text-align: center; background-color: #cccccc;">Displays only active patients</td> </tr> <tr> <th>Caregiver Code</th> <th>Caregiver Name</th> <th>Patient Number</th> <th>Patient Name</th> <th>Coordinators</th> <th>Phone</th> <th>Visit Date</th> <th>Schedule</th> <th>Visit</th> <th>Link</th> <th>Edit</th> </tr> <tr> <td>1022 <a href="#">Edit</a></td> <td>Hancher Stuart</td> <td>900021</td> <td>Ramirez Lonnie</td> <td>Brian</td> <td>Phone1 : 111-123-4567 <a href="#">Edit</a> Phone2 : <a href="#">Edit</a> Phone3 : <a href="#">Edit</a></td> <td>08/25/2015</td> <td>1600-2200 <a href="#">Edit</a></td> <td></td> <td></td> <td><a href="#">Edit</a></td> </tr> </tbody> </table> <p style="text-align: center;"><b>Caregiver Schedule</b></p>	Caregiver Code	Caregiver Name	Caregiver Phone	Caregiver Team	Patient Name	Call Date	Call Time	Call Type	Caller ID	1022	Hancher Stuart	Phone1 : 666-777-6666 Phone2 :			08/25/2015	16:03	IN H	666-777-6666	Displays only active patients									Caregiver Code	Caregiver Name	Patient Number	Patient Name	Coordinators	Phone	Visit Date	Schedule	Visit	Link	Edit	1022 <a href="#">Edit</a>	Hancher Stuart	900021	Ramirez Lonnie	Brian	Phone1 : 111-123-4567 <a href="#">Edit</a> Phone2 : <a href="#">Edit</a> Phone3 : <a href="#">Edit</a>	08/25/2015	1600-2200 <a href="#">Edit</a>			<a href="#">Edit</a>
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## Linking EVV

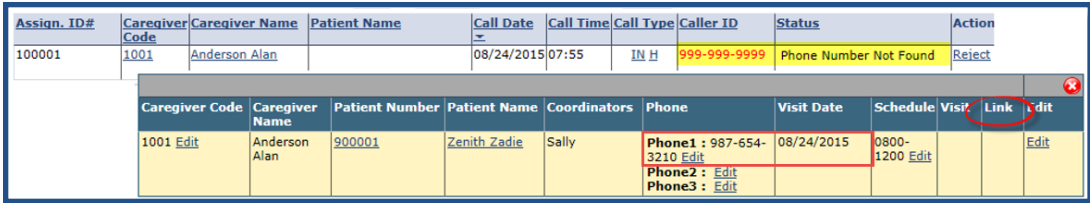
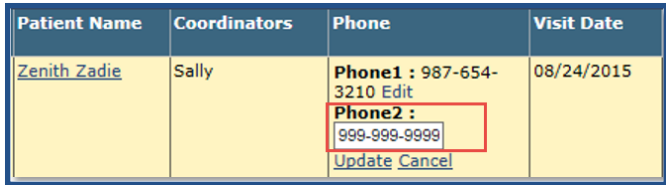
On the **Call Maintenance** page, EVV may be linked to a visit if enough information is available to determine the origin of the call and the associated visit. When linked, the EVV is removed from the *Call Maintenance* page. The following steps demonstrate an example of linking an EVV.

In the following example, Caregiver Alan Anderson places an EVV with a Caller ID of **999-999-9999** for a visit on 8/24. The **Status** of *Phone Number Not Found* indicates that no Patient has this number listed on their profile.

Assign. ID#	Caregiver Code	Caregiver Name	Patient Name	Call Date	Call Time	Call Type	Caller ID	Status	Action
100001	1001	Anderson Alan		08/24/2015	07:55	IN H	999-999-9999	Phone Number Not Found	Reject

### Phone Number Not Found Status

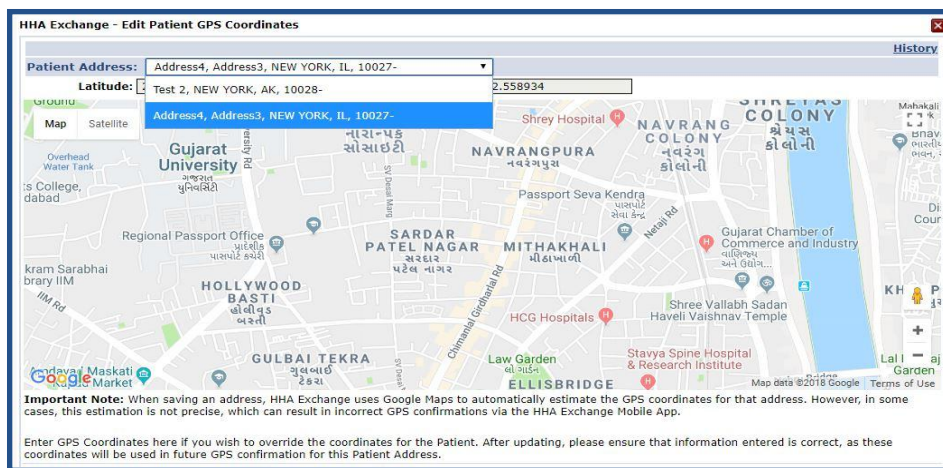
**Note:** HHAX recommends consulting an Agency's supervisor for best practices policies before linking an Unsuccessful EVV.

Step	Action
1	Click on the <b>Caregiver Name</b> column to access the Caregiver schedule details.
2	<p>The pop-up window opens. Confirm that the Caregiver was scheduled for a visit on 8/24. As illustrated in the image, Caregiver Alan has a visit on 8/24. However, the Patient's approved phone number is <b>987-654-3210</b>.</p>  <p style="text-align: center;"><b>Caregiver Schedule: Visit Details</b></p> <p><b>Note:</b> The <i>Link</i> option is not available to link this call.</p>
3	<p>Upon determining that the Caller ID number is a legitimate second phone line for the Patient, click the <a href="#">Edit</a> link (<b>Phone2</b>) under the <b>Phone</b> column to edit the phone number for the Patient. Click the <a href="#">Update</a> link to save the change.</p>  <p style="text-align: center;"><b>Edit Phone Number</b></p>
4	The Caller ID now matches a number on the Patient's Profile. The status on the <i>Call Maintenance</i> page changes to <b>Issue Fixed: Linkable Call</b> , allowing the EVV to be linked.

Step	Action																								
	<table border="1"> <thead> <tr> <th>Phone</th> <th>Visit Date</th> <th>Schedule</th> <th>Visit</th> <th>Link</th> <th>Edit</th> </tr> </thead> <tbody> <tr> <td>Phone1 : 987-654-3210 <a href="#">Edit</a></td> <td>08/24/2015</td> <td>0800-1200 <a href="#">Edit</a></td> <td></td> <td><a href="#">Link</a></td> <td><a href="#">Edit</a></td> </tr> <tr> <td>Phone2 : 999-999-9999 <a href="#">Edit</a></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Phone3 : <a href="#">Edit</a></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p style="text-align: center;"><b>Link Option Available</b></p> <p>Click <a href="#">Link</a> to link the EVV with the visit. The exception is removed from the <i>Call Maintenance</i> page.</p>	Phone	Visit Date	Schedule	Visit	Link	Edit	Phone1 : 987-654-3210 <a href="#">Edit</a>	08/24/2015	0800-1200 <a href="#">Edit</a>		<a href="#">Link</a>	<a href="#">Edit</a>	Phone2 : 999-999-9999 <a href="#">Edit</a>						Phone3 : <a href="#">Edit</a>					
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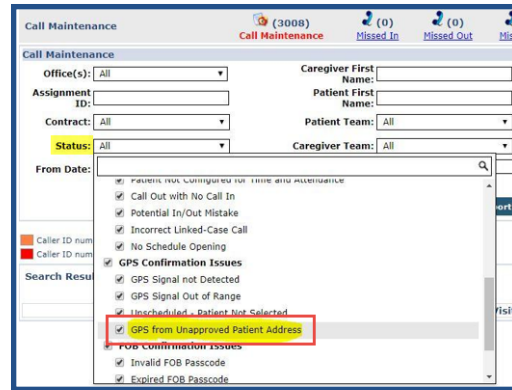
## Patient with Multiple Addresses

To see a Patient's Address GPS coordinates in the *Call Maintenance* page, click on the GPS icon to view the EVV location. The popup window shows the multiple locations. This applies to the various Call Maintenance pages (such as Rejected Calls).



**Patient Address: GPS Coordinates**

In support of the Multiple Address feature, select the **GPS from Unapproved Patient Address** exception on the *Call Maintenance* page to search for such visits.



GPS Unapproved Patient Address Exception

## EVV Confirmation from Multiple Patient Address

The following example illustrates how the system validates a GPS confirmation for Patient's with multiple "GPS Allowed" addresses on record: EVV confirmation is possible from multiple locations.

- Address 1 – Set as Allow GPS
- Address 2 – Set as Allow GPS
- Address 3 – Set to NOT Allow GPS

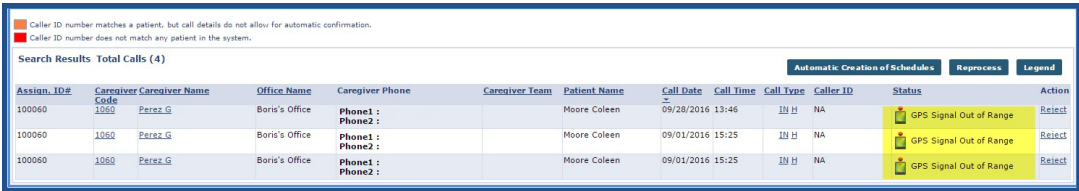
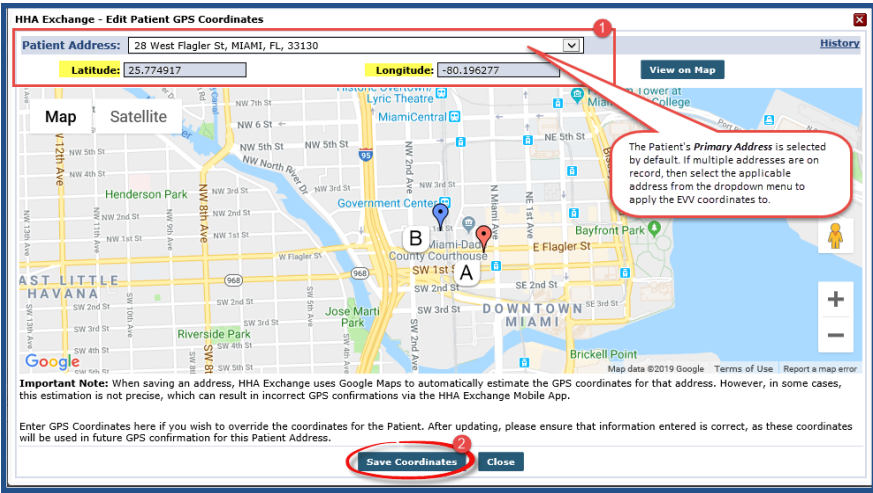
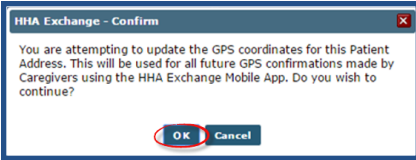
- GPS confirmation received within range of all three addresses; Result: Valid GPS confirmation
- GPS confirmation received within range of Address 2 + 3; Result: Valid GPS confirmation
- GPS confirmation received within range of only Address 3; Result: Call Maintenance exception for "GPS from Unapproved Patient Address"

## Editing GPS Coordinates

At times, the coordinates attributed to an address by Google Maps do not properly reflect the actual coordinates of the Patient's home. This may be common for Patients living in rural addresses or in large apartment complexes in a city.

To address this issue, users may recalculate the coordinates of a Patient's address using the coordinates associated with GPS based EVV that is being held on *Call Maintenance*. This allows Agencies to correct the coordinates attributed to a Google address by replacing them with the more accurate EVV coordinates.

Note that when the coordinates of a Patient's address are changed, all future EVV placed via GPS uses the updated coordinates to complete the confirmation. Coordinate updates should only be done for GPS based EVV that routinely ends up on the *Call Maintenance* page with a **Status** of *GPS Signal Out of Range* for a specific Patient. Complete the following steps to update Google coordinates for a Patient's address.

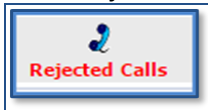
Step	Action
1	<p>Click the GPS icon under the <b>Status</b> column of the held EVV.</p>  <p style="text-align: center;"><b>Call Maintenance: GPS Signal Out of Range Status</b></p>
2	<p>The <i>Edit Member GPS Coordinates</i> window opens, displaying the coordinates of the EVV using Google Maps. The map contains a red marker (A), which indicates the current Google Map coordinates associated with the Member’s address and a blue marker (B), which indicates the Caregiver’s coordinates at the time the EVV was placed. The <b>Latitude</b> and <b>Longitude</b> fields (above the map) indicate the coordinates of where the EVV was placed.</p> <p>1) The Member’s Primary Address is selected by default. If multiple addresses are on record, then select the applicable address from the dropdown. 2) Select the <b>Save Coordinates</b> button at the bottom of the window to overwrite the Google coordinates with the EVV coordinates.</p>  <p style="text-align: center;"><b>Google Coordinates (Red Marker) and EVV Coordinates (Blue Marker)</b></p> <p><b>Note:</b> The <b>Latitude</b> and <b>Longitude</b> values in this window may not be edited; these represent EVV data received by HHAX.</p>
3	<p>A confirmation message opens alerting the user that all future GPS-based EVV for the Patient will be authenticated using the updated coordinates. Click the <b>OK</b> button to confirm and save.</p> 
4	<p>On the <i>Call Maintenance</i> page, click the <b>Search</b> button to prompt the system to reevaluate the</p>



Step	Action
	<p>previously held EVV. With the updated coordinates reflecting the Patient's address accurately, the EVV is processed and linked properly to the corresponding visit(s).</p> <div style="border: 1px solid #003366; padding: 5px; margin: 10px 0;"> </div> <p style="text-align: center;"><b>EVV Reprocessed</b></p>

## Rejecting EVV

An EVV that cannot be linked can be rejected. A rejected EVV is moved from the *Call Maintenance* page to the *Rejected Calls* page. The following is an example of rejecting an Unsuccessful EVV.



Caregiver Peter Capelli has placed a confirmation. The **Status** of *Caller ID Not Available* indicates the Caller ID was blocked.

Assign. ID#	Caregiver Code	Caregiver Name	Call Date	Call Time	Call Type	Caller ID	Status	Action
100023	1023	Capelli Peter	08/24/2011	11:56	IN H		Caller ID Not Available	Reject

**Caller ID Not Available**

Step	Action																																								
<b>1</b>	<p>Click on Peter's name under the <b>Caregiver Name</b> column to confirm the visit on 8/24. This opens a menu containing additional schedule information.</p> <div style="border: 1px solid #003366; padding: 5px; margin: 10px 0;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Caregiver Code</th> <th>Caregiver Name</th> <th>Caregiver Phone</th> <th>Caregiver Team</th> <th>Member Name</th> <th>Call Date</th> <th>Call Time</th> <th>Call Type</th> <th>Caller ID</th> </tr> </thead> <tbody> <tr> <td>1023</td> <td>Capelli Peter</td> <td>Phone1 : Phone2 :</td> <td></td> <td></td> <td>08/24/2011</td> <td>11:56</td> <td>IN H</td> <td></td> </tr> </tbody> </table> <p style="font-size: small; margin-top: 5px;">Displays only active patients</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Caregiver Code</th> <th>Caregiver Name</th> <th>Member Number</th> <th>Member Name</th> <th>Coordinators</th> <th>Phone</th> <th>Visit Date</th> <th>Schedule</th> <th>Visit</th> <th>Link</th> <th>Edit</th> </tr> </thead> <tbody> <tr> <td>1023</td> <td>Capelli Peter</td> <td>900022</td> <td>Del Valle Rebecca</td> <td>Brian</td> <td>Phone1 : 485-857-4765 Phone2 : Phone3 :</td> <td>08/24/2011</td> <td>1200-1700</td> <td>Edit</td> <td></td> <td style="border: 2px solid red; border-radius: 50%; text-align: center;">Edit</td> </tr> </tbody> </table> </div> <p style="text-align: center;"><b>Caregiver Schedule</b></p> <p>In this example, the visit cannot be linked because the system could not verify the Caller ID. Therefore, there is no way to confirm if the EVV was made from the Patient's home. Moreover, without a number to save, the <b>Link</b> option does not appear.</p>	Caregiver Code	Caregiver Name	Caregiver Phone	Caregiver Team	Member Name	Call Date	Call Time	Call Type	Caller ID	1023	Capelli Peter	Phone1 : Phone2 :			08/24/2011	11:56	IN H		Caregiver Code	Caregiver Name	Member Number	Member Name	Coordinators	Phone	Visit Date	Schedule	Visit	Link	Edit	1023	Capelli Peter	900022	Del Valle Rebecca	Brian	Phone1 : 485-857-4765 Phone2 : Phone3 :	08/24/2011	1200-1700	Edit		Edit
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<b>2</b>	<p>Click on the <a href="#">Edit</a> link to open the visit details and select the Timesheet Required checkbox. To verify this visit, the Caregiver must submit a physical, signed timesheet to confirm the shift.</p>																																								
EVV Management	Page 21 Rejecting EVV Proprietary and Confidential																																								

Step	Action												
	<div style="border: 1px solid black; padding: 5px; margin: 10px auto; width: fit-content;">           Duty Sheet POC: 0(00:00) Others: 0(00:00) Total: 0(00:00)  <input checked="" type="checkbox"/> Timesheet Required    <input type="checkbox"/> Timesheet Approved         </div> <p style="text-align: center;"><b>Timesheet Required</b></p> <p>Once the Caregiver hands in the Timesheet, approval must be manually entered in the system by selecting the <b>Timesheet Approved</b> checkbox on the Visit Window.</p>												
3	<p>On the <i>Call Maintenance</i> page, click the <a href="#">Reject</a> hyperlink under the <b>Action</b> column.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px auto; width: fit-content;"> <table border="1"> <thead> <tr> <th>Assign. ID#</th> <th>Caregiver Code</th> <th>Caregiver Name</th> <th>ID</th> <th>Status</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>100023</td> <td>1023</td> <td>Capelli Peter</td> <td></td> <td></td> <td style="text-align: center;"><a href="#">Reject</a></td> </tr> </tbody> </table> </div> <p style="text-align: center;"><b>Reject EVV Link</b></p>	Assign. ID#	Caregiver Code	Caregiver Name	ID	Status	Action	100023	1023	Capelli Peter			<a href="#">Reject</a>
Assign. ID#	Caregiver Code	Caregiver Name	ID	Status	Action								
100023	1023	Capelli Peter			<a href="#">Reject</a>								
4	Click <b>OK</b> to confirm the rejection.												
5	After confirming, the EVV is removed from the <i>Call Maintenance</i> page and placed on the <i>Rejected Calls</i> tab of the Call Dashboard.												

## Reversing Rejected Calls

Rejected Calls may be reversed if an EVV was mistakenly rejected. Reversing a rejected call sends it back to the *Call Maintenance* page, where the EVV can be linked to the appropriate visit. Complete the following steps to reverse a rejection in the system.

Step	Action																																																
1	Navigate to the <i>Reject Calls</i> page and search for the applicable rejected call.																																																
2	<p>In the results, locate the call and click the <b>Information bubble</b> for details.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px auto; width: fit-content;"> <p>Search Results Total Calls (3)</p> <table border="1"> <thead> <tr> <th>Assign. ID#</th> <th>Caregiver Code</th> <th>Caregiver Name</th> <th>Office Name</th> <th>Caregiver Phone</th> <th>Caregiver Team</th> <th>Patient Name</th> <th>Call Date</th> <th>Call Time</th> <th>Call Type</th> <th>Caller ID</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>100061</td> <td>1061</td> <td>Smith Jack</td> <td>Citi Caregivers</td> <td>Phone1 : Phone2 :</td> <td></td> <td></td> <td>03/25/2016</td> <td>11:49</td> <td>IN</td> <td>NA</td> <td>🚫 Unscheduled - Patient Not Selected</td> </tr> <tr> <td>100048</td> <td>1048</td> <td>Perez Gloria</td> <td>Citi Caregivers</td> <td>Phone1 : 718-366-1622 Phone2 :</td> <td></td> <td>Fisher Max</td> <td>03/15/2016</td> <td>10:46</td> <td>OUT</td> <td>NA</td> <td>🚫 No Schedule on Calendar (EVV Time: 03/15/2016 10:47)</td> </tr> <tr> <td>100048</td> <td>1048</td> <td>Perez Gloria</td> <td>Citi Caregivers</td> <td>Phone1 : 718-366-1622 Phone2 :</td> <td></td> <td>Fisher Max</td> <td>03/15/2016</td> <td>10:17</td> <td>IN</td> <td>NA</td> <td>🚫 No Schedule on Calendar</td> </tr> </tbody> </table> </div> <p style="text-align: center;"><b>Rejected Calls</b></p>	Assign. ID#	Caregiver Code	Caregiver Name	Office Name	Caregiver Phone	Caregiver Team	Patient Name	Call Date	Call Time	Call Type	Caller ID	Status	100061	1061	Smith Jack	Citi Caregivers	Phone1 : Phone2 :			03/25/2016	11:49	IN	NA	🚫 Unscheduled - Patient Not Selected	100048	1048	Perez Gloria	Citi Caregivers	Phone1 : 718-366-1622 Phone2 :		Fisher Max	03/15/2016	10:46	OUT	NA	🚫 No Schedule on Calendar (EVV Time: 03/15/2016 10:47)	100048	1048	Perez Gloria	Citi Caregivers	Phone1 : 718-366-1622 Phone2 :		Fisher Max	03/15/2016	10:17	IN	NA	🚫 No Schedule on Calendar
Assign. ID#	Caregiver Code	Caregiver Name	Office Name	Caregiver Phone	Caregiver Team	Patient Name	Call Date	Call Time	Call Type	Caller ID	Status																																						
100061	1061	Smith Jack	Citi Caregivers	Phone1 : Phone2 :			03/25/2016	11:49	IN	NA	🚫 Unscheduled - Patient Not Selected																																						
100048	1048	Perez Gloria	Citi Caregivers	Phone1 : 718-366-1622 Phone2 :		Fisher Max	03/15/2016	10:46	OUT	NA	🚫 No Schedule on Calendar (EVV Time: 03/15/2016 10:47)																																						
100048	1048	Perez Gloria	Citi Caregivers	Phone1 : 718-366-1622 Phone2 :		Fisher Max	03/15/2016	10:17	IN	NA	🚫 No Schedule on Calendar																																						
3	<p>The <i>Call Rejection Details</i> popup opens containing details such as who rejected the EVV, date and time of rejection, and a <a href="#">Reverse Call Rejection</a> link. Click on the link to continue.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px auto; width: fit-content;"> <div style="border: 1px solid black; padding: 5px;"> <p><b>Call Rejection Details</b></p> <table border="1"> <thead> <tr> <th>Rejected By</th> <th>Time</th> <th></th> </tr> </thead> <tbody> <tr> <td>MarkNE</td> <td>03/15/2016 11:10:10 AM</td> <td style="text-align: center;"><a href="#">Reverse Call Rejection</a></td> </tr> </tbody> </table> </div> </div> <p style="text-align: center;"><b>Call Rejection Details Popup</b></p>	Rejected By	Time		MarkNE	03/15/2016 11:10:10 AM	<a href="#">Reverse Call Rejection</a>																																										
Rejected By	Time																																																
MarkNE	03/15/2016 11:10:10 AM	<a href="#">Reverse Call Rejection</a>																																															
4	Click <b>Yes</b> to confirm the action.																																																
5	The EVV is removed from the <i>Rejected Calls</i> page and routed back to <i>Call Maintenance</i> .																																																

Step	Action																										
	<div style="border: 1px solid #003366; padding: 5px;"> <p style="text-align: right; margin: 0;"> <a href="#">Automatic Creation of Schedules</a>   <a href="#">Reprocess</a>   <a href="#">Legend</a> </p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Assign. ID#</th> <th>Caregiver Code</th> <th>Caregiver Name</th> <th>Office Name</th> <th>Caregiver Phone</th> <th>Caregiver Team</th> <th>Patient Name</th> <th>Call Date</th> <th>Call Time</th> <th>Call Type</th> <th>Caller ID</th> <th>Status</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>100048</td> <td>1048</td> <td>Perez Gloria</td> <td>Citi Caregivers</td> <td>Phone1 : 718-366-1622 Phone2 :</td> <td></td> <td>Fisher Max</td> <td>03/15/2016</td> <td>10:46</td> <td>OUT</td> <td>NA</td> <td>No Schedule on Calendar (EVV Time: 03/15/2016 10:47)</td> <td>Reject</td> </tr> </tbody> </table> </div> <p style="text-align: center; margin-top: 5px;"><b>Call placed back on Call Maintenance Page</b></p>	Assign. ID#	Caregiver Code	Caregiver Name	Office Name	Caregiver Phone	Caregiver Team	Patient Name	Call Date	Call Time	Call Type	Caller ID	Status	Action	100048	1048	Perez Gloria	Citi Caregivers	Phone1 : 718-366-1622 Phone2 :		Fisher Max	03/15/2016	10:46	OUT	NA	No Schedule on Calendar (EVV Time: 03/15/2016 10:47)	Reject
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<b>6</b>	Link the EVV to the appropriate visit.																										

**Note:** An EVV can be rejected and reversed multiple times. The record in the Call Rejection Details popup maintains a record of each rejection.

# Call Dashboard Resolutions

## Phone Number Issues

Problem	Resolution
<p><b>Phone Number Not Found</b></p>	<p><b>Phone Number Verified</b></p> <ol style="list-style-type: none"> <li>1. Click on the Caregiver in the <b>Caregiver Name</b> column.</li> <li>2. In the popup, click <u>Edit</u> in the Phone column (either update an existing number or add a new one).</li> <li>3. Click <u>Update</u> and close the popup.</li> <li>4. Select <b>Reprocess</b>. The status of the EVV updates to <b>Issue Fixed: Linkable Call</b>.</li> <li>5. Click on the number in the <b>Caller ID</b> column.</li> <li>6. In the popup, click <u>Link</u> to connect the EVV.</li> </ol> <p><b>Phone Number not Verified</b></p> <p>Click on <u>Reject</u> in the <b>Action</b> column to discard the call.</p>
<p><b>Call from Caregiver Number / Caller ID Not Available</b></p>	<ol style="list-style-type: none"> <li>1. Click on the Caregiver in the <b>Caregiver Name</b> column.</li> <li>2. In the popup, click <u>Edit</u> to navigate to the visit window.</li> <li>3. In the <i>Visit Info</i> tab, select <b>Timesheet Required</b>.</li> <li>4. Click <b>Save</b> and close the visit window.</li> <li>5. Click on <u>Reject</u> in the <b>Action</b> column to discard the call.</li> </ol> <p><b>OR</b></p> <p>Click on <u>Reject</u> in the <b>Action</b> column to discard the call without selecting <b>Timesheet Required</b>.</p>
<p><b>Call from Unapproved Patient Phone Number</b></p>	<ol style="list-style-type: none"> <li>1. Navigate to Admin &gt; Agency Profile.</li> <li>2. In the <b>Accept Time and Attendance Call From</b>, select <i>Phone 2</i> and/or <i>Phone 3</i>.</li> <li>3. The call links automatically.</li> </ol> <p><b>Note:</b> Only users with the permissions to access the <b>Admin</b> Module and the <b>Agency Profile</b> page may resolve the issue in this manner.</p> <p><b>OR</b></p> <p>Click on <u>Reject</u> in the <b>Action</b> column to discard the call.</p>

## Scheduling/Confirmation Issues

Problem	Resolution
<b>Duplicate Call</b>	<p><b><i>Duplicate Call In/Call Out</i></b></p> <ol style="list-style-type: none"> <li>1. Click on the number in the <b>Caller ID</b> column.</li> <li>2. In the <b>Visit</b> column, check for an existing visit start time or end time.</li> <li>3. If there is a start or end time listed, close the popup and use the <u>Reject</u> link in the <b>Action</b> column to discard the duplicate call.</li> </ol> <p><b><i>Duplicate Call Out with Duties</i></b></p> <ol style="list-style-type: none"> <li>1. Click on the number in the <b>Caller ID</b> column.</li> <li>2. In the <b>Visit</b> column, check for Duties. If there are none recorded, click on <u>Edit</u> in the <b>Edit</b> column</li> <li>3. Delete the <b>Visit End Time</b> in the visit window.</li> <li>4. Close the visit window and refresh the <b>Call Maintenance</b> page.</li> <li>5. Click on the number in the <b>Caller ID</b> column.</li> <li>6. Click <u>Link</u> in the popup to attach the EVV with Duties to the visit.</li> </ol>
<b>Out of Window</b>	<ol style="list-style-type: none"> <li>1. Click on the Caregiver in the <b>Caregiver Name</b> column.</li> <li>2. Click <u>Link</u> to connect the EVV to the visit.</li> </ol> <p><b><i>OR</i></b></p> <ol style="list-style-type: none"> <li>1. Click the Caregiver's name to open a popup with the visit details.</li> <li>2. In the <b>Edit</b> column, click <u>Edit</u> to open the visit window.</li> <li>3. Manually enter the visit start or end time on the <i>Schedule</i> tab and select <b>Timesheet Required</b>.</li> </ol> <p><b><i>OR</i></b></p> <p>If the EVV is bad, click on <u>Reject</u> in the <b>Action</b> column to discard the call.</p>
<b>TEMP Caregiver Scheduled</b>	<ol style="list-style-type: none"> <li>1. Click on the number in the <b>Caller ID</b> column.</li> <li>2. In the <b>Caregiver Code</b> column, click <u>Edit</u>.</li> <li>3. Enter the code of the Caregiver who worked the shift and click <b>Update</b>.</li> <li>4. Navigate to the <u>Edit</u> link in the right-most column to open the visit window.</li> <li>5. Link the calls made by the Caregiver.</li> </ol>

Problem	Resolution
<b>Different Caregiver Scheduled</b>	<ol style="list-style-type: none"> <li>1. Click on the number in the <b>Caller ID</b> column.</li> <li>2. In the <b>Caregiver Code</b> column, click <u>Edit</u>.</li> <li>3. Assign the Caregiver who placed the EVVs. This is the Caregiver who is attached to the issue.</li> <li>4. Navigate to the <u>Edit</u> link in the right-most column to open the visit window.</li> <li>5. Link the calls made by the Caregiver.</li> </ol>
<b>Visit Verified by Different Caregiver</b>	<ol style="list-style-type: none"> <li>1. Verify which Caregiver worked the scheduled visit.</li> <li>2. If EVV is good, click on the number in the <b>Caller ID</b> column.</li> <li>3. In the <b>Caregiver Code</b> column, click <u>Edit</u> to update the visit information to reflect the right Caregiver.</li> <li>4. In the <b>Edit</b> column, click <u>Edit</u> to open the visit window and link the calls.</li> </ol> <p style="text-align: center;"><b>OR</b></p> <p>If the EVV is bad, click on <u>Reject</u> in the <b>Action</b> column to discard the call.</p>
<b>No Schedule on Calendar</b>	<ol style="list-style-type: none"> <li>1. Click on the number in the <b>Caller ID</b> column.</li> <li>2. In the <b>Edit</b> column, click <u>New Schedule</u></li> <li>3. Complete the required fields in the visit window's <i>Schedule</i> tab.</li> <li>4. Click <b>Save</b></li> </ol> <p style="text-align: center;"><b>OR</b></p> <p>If the EVV is bad, click on <u>Reject</u> in the Action column to discard the call.</p>
<b>Call from Inactive Patient</b>	<ol style="list-style-type: none"> <li>1. Click on the number in the <b>Caller ID</b> column.</li> <li>2. In the popup, click on the Patient's name to navigate to their profile.</li> <li>3. In the Patient Profile, open the <b>General</b> page.</li> <li>4. Click on the <b>Update Status</b> button and set the status to <i>Active</i>.</li> <li>5. On the Call Maintenance Page, click <b>Reprocess</b>.</li> <li>6. Click on the number in the <b>Caller ID</b> column and <u>Link</u> to connect the EVVs to the visit.</li> </ol> <p style="text-align: center;"><b>OR</b></p> <p>If the visit was not authorized, click on <u>Reject</u> in the <b>Action</b> column to discard the call.</p>

Problem	Resolution
<b>Patient Not Configured for Time and Attendance</b>	<ol style="list-style-type: none"> <li>Click on the number in the <b>Caller ID</b> column.</li> <li>In the popup, click on <u>Link</u> to connect one of the EVVs to the visit.</li> <li>This opens the <i>Visit Info</i> tab of the visit window.</li> <li>Click the <b>Link Call</b> button to connect the remaining EVV to the visit.</li> </ol> <p><b>OR</b></p> <p>If the EVV is bad, click on <u>Reject</u> in the <b>Action</b> column to discard the call.</p>
<b>Call Out with No Call In</b>	<ol style="list-style-type: none"> <li>Click on the number in the <b>Caller ID</b> column.</li> <li>In the <b>Edit</b> column, click <u>Edit</u></li> <li>Manually enter the <b>Visit Start Time</b>.</li> </ol> <p><b>OR</b></p> <p>Search for the <i>Call In</i> EVV on the <b>Call Maintenance</b> page. If found, resolve the issue and link to the visit.</p>
<b>Potential In/Out Mistake</b>	<p>In the <b>Call Type</b> column, click on either the <u>IN</u> or <u>OUT</u> link to swap the EVV from IN to OUT or vice versa.</p>
<b>Incorrect Linked-Case Call</b>	<p>EVVs with this status cannot be fixed. Click on <u>Reject</u> in the <b>Action</b> column to discard the call. The visit either requires a manual confirmation, or another EVV placed by the Caregiver at the right time.</p>
<b>No Schedule Opening</b>	<p>This problem occurs when the system cannot categorize a call exception into any of the other statuses. User must either research the call and visit info in order to identify the error <b>OR</b> click on <u>Reject</u> in the <b>Action</b> column to discard the call.</p>

## GPS Confirmation Issues

Problem	Resolution
GPS Signal Not Detected	EVVs with this status cannot be fixed. Click on <a href="#">Reject</a> in the <b>Action</b> column to discard the call. The visit requires a manual confirmation.
GPS Signal Out of Range	<p>In some scenarios, the coordinates attributed to an address by Google Maps do not properly reflect the actual coordinates of the Patient's home. This is particularly true of rural addresses but may also occur in cities when a Patient lives in a large apartment complex.</p> <p>To address this issue, users may recalculate the coordinates of a Patient's address using the coordinates associated with GPS based EVV that is being held on <b>Call Maintenance</b>. This allows Agencies to correct the coordinates attributed to an address by Google by replacing them with the more accurate EVV coordinates.</p> <p>Further information is located in the <b>Editing GPS Coordinates</b> section of the <a href="#">Call Dashboard</a> topic.</p>
Unscheduled – Patient not Scheduled	EVVs with this status cannot be fixed. Click on <a href="#">Reject</a> in the <b>Action</b> column to discard the call. The visit requires a manual confirmation.

## FOB Confirmation Issues

Problem	Resolution
Invalid FOB Passcode	EVVs with this status cannot be fixed. Click on <a href="#">Reject</a> in the <b>Action</b> column to discard the call. The visit requires a manual confirmation.
Expired FOB Passcode	EVVs with this status cannot be fixed. Click on <a href="#">Reject</a> in the <b>Action</b> column to discard the call. The visit requires a manual confirmation.
FOB Confirmation for Inactive Patient	<ol style="list-style-type: none"> <li>1. Navigate <b>Patient &gt; Patient Search</b> and select the appropriate Patient.</li> <li>2. In the Patient Profile, open the <b>General</b> page.</li> <li>3. Click on the <b>Update Status</b> button and set the status to <b>Active</b>.</li> </ol>

## Call Reprocess

Problem	Resolution
Issue Fixed: Linkable Call	<ol style="list-style-type: none"> <li>1. Click on the number in the Caller ID column.</li> <li>2. In the popup, click on Link to connect one of the EVVs to the visit.</li> </ol>



## No Confirmations Received

When a visit is missing one or both EVV confirmations, it is held in the **Missed In**, **Missed Out**, or **Missed Call** buckets (as described in the table below the image). Visits are held on these pages for a day or two, or until the applicable time(s) is entered.



Missed In/Out/Call

**Note:** The number in the parenthesis represents the number of visits held in each of these pages.

Visits held in...	Because...
<b>Missed In</b>	an EVV is not received within the set <b>Unbalanced Tolerance</b> at the <i>start</i> of a visit. Visits remain on this page for one day, or until a <b>Visit Start Time</b> is entered.
<b>Missed Out</b>	an EVV is received for the start of a visit, but not within the <b>Unbalanced Tolerance</b> range at the end. Visits remain on this page for two days or until a <b>Visit End Time</b> is entered.
<b>Missed Call</b>	there is no acceptable EVV for either the start or end time of a visit. Visits remain on this page for two days or until the <b>Visit Start Time</b> and <b>Visit End Time</b> is entered.

## Confirming Visits

Visits sent to the **Missed In/Out/Call** pages can be confirmed by linking EVVs found on the *Call Maintenance* page or manually adjusted. The following example demonstrates how to correct a Visit that is missing a **Missed Out**.


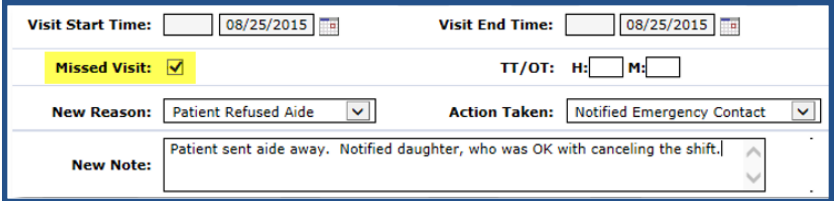
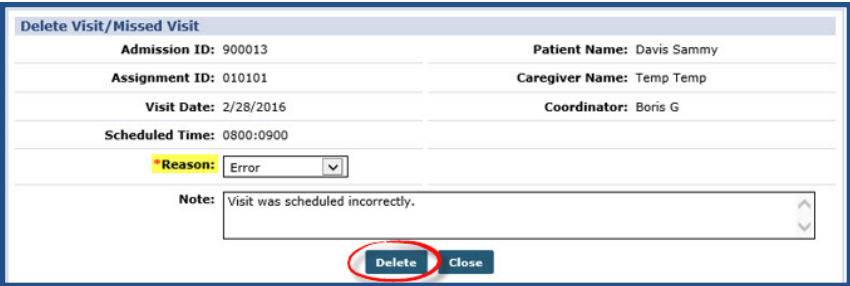
Step	Action																														
1	Navigate to <b>Visit &gt; Call Dashboard &gt; Missed Out</b> and generate a search for held visits.																														
2	In the search results, each line item contains relevant Visit info including a <b>Find Calls</b> button. Select the <b>Find Calls</b> button to search for EVVs on the <b>Call Maintenance</b> page to link to the visit. <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <table border="1"> <thead> <tr> <th>Assign.ID</th> <th>Patient Name</th> <th>Office Name</th> <th>Phone</th> <th>Adm.ID</th> <th>Vendor</th> <th>Caregiver Name</th> <th>Visit Date</th> <th>Coordinators</th> <th>Schedule</th> <th>Contract</th> <th>Discipline/Code</th> <th>Swg</th> <th>Caregiver Team</th> <th>Page 1 of 1</th> </tr> </thead> <tbody> <tr> <td>010101</td> <td>Davis, Samitty</td> <td>Long Island City</td> <td>718-499-1234</td> <td>900013</td> <td>NEHS</td> <td>Temp Temp</td> <td>02/29/2016</td> <td>Boris G</td> <td>0800-1200</td> <td>Heaven's Care</td> <td>HHA</td> <td>HHA Hourly Reg</td> <td></td> <td>Find Calls </td> </tr> </tbody> </table> <p style="text-align: center;"><b>Visit Details</b></p> </div>	Assign.ID	Patient Name	Office Name	Phone	Adm.ID	Vendor	Caregiver Name	Visit Date	Coordinators	Schedule	Contract	Discipline/Code	Swg	Caregiver Team	Page 1 of 1	010101	Davis, Samitty	Long Island City	718-499-1234	900013	NEHS	Temp Temp	02/29/2016	Boris G	0800-1200	Heaven's Care	HHA	HHA Hourly Reg		Find Calls
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3	If the EVV matches the visit information, click on <a href="#">Link</a> to link the EVV to the visit. If no call matches, click the <b>edit</b> icon to navigate to the visit to manually edit.																														

Step	Action
	<div data-bbox="302 302 1386 470"> </div> <p data-bbox="787 489 906 514" style="text-align: center;"><b>Linking EVV</b></p> <p data-bbox="266 533 1422 596"><i>Note: A manual confirmation should only be completed once the Agency has a Timesheet verifying the Visit End Time.</i></p>
4	<p data-bbox="266 617 1409 684">On the <i>Visit Info</i> tab, manually update the necessary confirmation details based on the Agency's internal policies. Select the <b>New Reason</b> from the required field.</p> <div data-bbox="354 703 1338 1010"> </div> <p data-bbox="740 1026 954 1052" style="text-align: center;"><b>Manual Confirmation</b></p> <p data-bbox="266 1071 1409 1134"><i>Note: Depending on the New Reason selected other fields may become required (such as Action Taken or New Note). Required fields are denoted with a red asterisk.</i></p>
5	<p data-bbox="266 1163 1393 1264">As best-practice, select the entity who verified the visit as well as the date and time of verification. To prevent billing issues, select the <b>Timesheet Required</b> checkbox followed by the <b>Timesheet Approved</b> checkbox once the physical timesheet is submitted.</p> <div data-bbox="474 1278 1214 1507"> </div> <p data-bbox="756 1524 938 1549" style="text-align: center;"><b>Audit Information</b></p>

## Missed / Deleted Visits

Periodically, a Visit is incorrectly scheduled, or a service is not provided for some reason. Shifts that do not take place are either marked as a Missed Visit or deleted from the system. Complete the following steps to delete a visit or mark it as a Missed Visit.

**Note:** Ensure to review the Agency's internal policies regarding deleting or editing Visits.

Step	Action
1	<p>To mark a visit as missed, use the <b>edit</b> icon to open the visit window and select <b>Missed Visit</b>. To delete the visit entirely, click on the <b>delete</b> icon next to the edit icon.</p>  <p style="text-align: center;"><b>Edit or Delete Visit</b></p>
2	<p>For a <u>missed</u> visit, select the <b>Missed Visit</b> checkbox and complete any required fields on the <i>Visit Info</i> tab. Click the <b>Save</b> button to save changes.</p>  <p style="text-align: center;"><b>Missed Visit</b></p> <p>For a <u>deleted</u> visit, select the required <b>Reason</b> for deletion from the dropdown and add any pertinent notes. Click the <b>Delete</b> button.</p>  <p style="text-align: center;"><b>Delete Visit</b></p>
3	<p>When a visit is marked as missed, the <b>Visit Start</b> and <b>End Times</b> lock. Before the updated visit information can be saved, the <b>Missed Visit Reason</b>, <b>Action Taken</b>, and <b>Note</b> must be entered to document the reason for the Missed Visit.</p>

Step	Action			
	<div style="border: 1px solid black; padding: 5px;"> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%; border-right: 1px solid black; padding: 2px;"> <p>S:2100-2200</p> <p>V:-</p> <p>B: N</p> <p>Cox</p> <p>Sandra</p> </td> <td style="width: 33%; border-right: 1px solid black; padding: 2px;"> <p>S</p> <p><b>Missed Visit (HHA, Non-Skilled)</b></p> <p>TT(H): 01:00 A</p> <p>B: N</p> </td> <td style="width: 33%; padding: 2px;"> <p>6</p> <p>S:2100-2200</p> <p>V:-</p> <p>B: N</p> <p>Cox</p> <p>Sandra</p> </td> </tr> </table> <p style="text-align: center; margin-top: 5px;">Missed Visit</p> </div>	<p>S:2100-2200</p> <p>V:-</p> <p>B: N</p> <p>Cox</p> <p>Sandra</p>	<p>S</p> <p><b>Missed Visit (HHA, Non-Skilled)</b></p> <p>TT(H): 01:00 A</p> <p>B: N</p>	<p>6</p> <p>S:2100-2200</p> <p>V:-</p> <p>B: N</p> <p>Cox</p> <p>Sandra</p>
<p>S:2100-2200</p> <p>V:-</p> <p>B: N</p> <p>Cox</p> <p>Sandra</p>	<p>S</p> <p><b>Missed Visit (HHA, Non-Skilled)</b></p> <p>TT(H): 01:00 A</p> <p>B: N</p>	<p>6</p> <p>S:2100-2200</p> <p>V:-</p> <p>B: N</p> <p>Cox</p> <p>Sandra</p>		

# EVV-Based Visit Scheduling and Confirmation

**Tip:** Press the **Ctrl-F** keys to search this topic.

If a Patient requires immediate service outside of their normal schedule, then EVV can be used to schedule and confirm visits, as follows:

Option	Description (How it works)
<b>Automatic Visit Creation Based on EVV Confirmation</b>	Identify incoming EVV placed for Patients under a specific <b>Contract</b> and using the confirmation details to schedule and confirm the visit.
<b>Automatic Creation of Schedules</b>	Review all EVV received by the system that could not be matched to scheduled visits and use to create partially or fully confirmed visits.

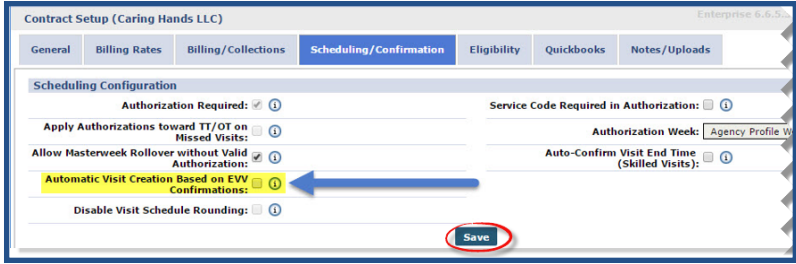
## Automatic Visit Creation for Contracts

The following criteria must be met to use the **Automatic Visit Creation** functionality:

- The **Automatic Visit Creation Based on EVV Confirmation** field selected on the *Contract Setup* page.
- Patients receiving service under the associated Contract must have a **Default Service Code**.
- The discipline(s) providing service to the Patient has a **Default Pay Code**.
- Additionally, Caregivers *must* place the EVV (both Clock In and Clock Out) from a single, verified, Patient phone number. If either call ends up on *Call Maintenance*, the system is not able to generate/confirm the visit.

## Contract Setup

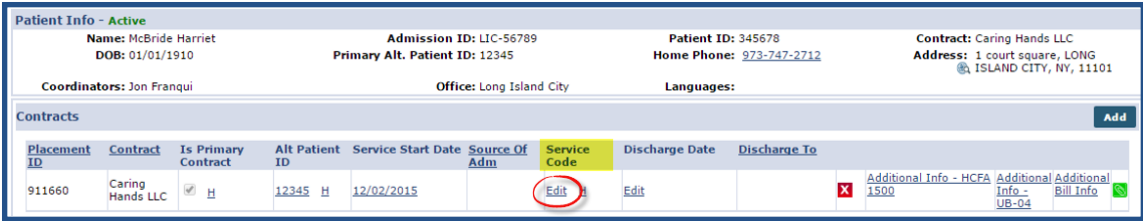
Follow the steps below to complete the Contract Setup required to permit EVV-based visit scheduling and confirmation for a specific **Contract**.

Step	Action
1	Navigate to <b>Admin &gt; Contract Setup &gt; Contract Search</b> and select a Contract.
2	Select the <i>Scheduling / Confirmation</i> tab at the top of the page and scroll to the <i>Scheduling Configuration</i> section.
3	In the <i>Scheduling Configuration</i> section, select the <b>Automatic Visit Creation Based on EVV Confirmation</b> checkbox. Click the <b>Save</b> button to finalize. <div style="text-align: center;">  <p><b>Automatic Visit Creation Based on EVV</b></p> </div>

Going forward, the system uses EVV from visits scheduled under this **Contract** to create and confirm Visits.

## Default Service Code

For the system to automatically generate a visit based on EVV information, all Patients receiving service under the associated Contract must have a **Default Service Code**. Complete the following steps to enter a Patient's **Default Service Code**.

Step	Action
1	Navigate to <b>Patient &gt; Patient Search</b> and select a Patient.
2	In the Patient Profile, open the <i>Contracts</i> page and check for the <b>Service Code</b> . <div style="text-align: center;">  <p><b>Patient Contract Page – Service Code</b></p> </div>
3	If no <b>Service Code</b> is associated with the Contract, click the <a href="#">Edit</a> link under the <i>Service Code</i> column and select a code.

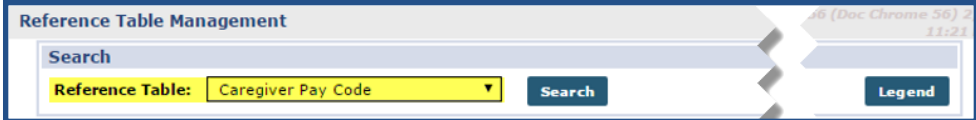
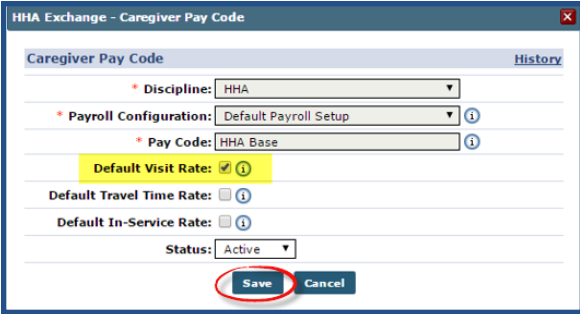
Step	Action
	<p style="text-align: center;"><b>Select Default Service Code</b></p>
4	<p>Once a <b>Service Code</b> is selected, click the <a href="#">Update</a> link. The Patient now has a <b>Default Service Code</b> for the Contract.</p> <p style="text-align: center;"><b>Save Default Service Code</b></p>

**Note:** Automatic Visit Creation may be deactivated at any time for a specific Patient by navigating to **Patient > Patient Profile > General** and selecting the **Disable Automatic Visit Creation Based on EVV Confirmation** checkbox.

**Disable Visit Creation**

## Default Pay Code

For the system to apply a **Pay Code** to the Visit, the discipline(s) providing service for the Patient needs a **Default Pay Code**. Complete the following steps to apply.

Step	Action
1	Navigate to <b>Admin &gt; Reference Table Management</b> .
2	Select the <b>Caregiver Pay Code Reference Table</b> dropdown.  <p style="text-align: center;">Reference Table - Caregiver Pay Code</p>
3	Click the <b>Search</b> button to view the existing Pay Codes. To add a new Pay Code, click the <b>Add</b> button.
4	The <b>Caregiver Pay Code</b> window opens. Complete the required fields (denoted with red asterisks). Select the <b>Default Visit Rate</b> checkbox.  <p style="text-align: center;">Set Default Visit Rate</p>
5	Click the <b>Save</b> button to finalize. Moving forward, the system automatically applies this Pay Code to visits scheduled with the associated discipline.



# Automatic Creation of Schedules

The **Automatic Creation of Schedules** function is used to link EVV held on the **Call Maintenance** page to visits missing one or both confirmations. This feature allows Agencies to correct visits to include missing details in the system. An Agency must coordinate with the Caregiver to obtain any missing visit information (such as the confirmed Clock-In and/or Clock-Out times) to properly record in the system.

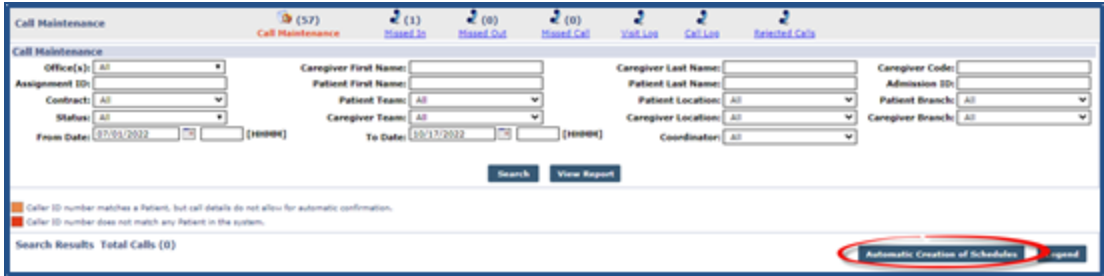
Consider the following factors when using this feature:



- Each Caregiver must be assigned to a Patient via the Patient Profile (**Patient > General**) to be able to perform EVV for unscheduled visits via the Mobile App. Refer to the [Assigning Caregivers to a Patient Profile](#) section for further details.
- To prevent billing issues, it is recommended for Agencies to review the Call Maintenance page on a **weekly basis** to ensure all visits are correct and completed.

Situations where visits may end up on Call Maintenance include:

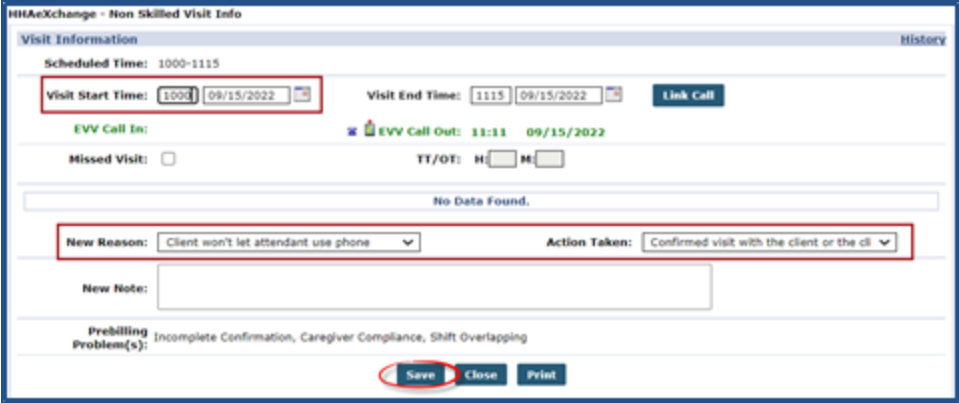
- When Call In or Call Out is missing,
- When the appropriate **Service Code** is not selected, in cases of multiple contracts/authorizations, and
- If a visit is confirmed via IVR, and the Patient has multiple contracts/authorizations, then the Service Code must be manually selected on the visit in the Automatic Creation of Schedules feature. A **Service Code** cannot be selected by a Caregiver using IVR.

Complete the following steps when using the Automatic Creation of Schedules method to confirm visits.

Step	Action
1	Navigate to <b>Visit &gt; Call Dashboard</b> and select <b>Call Maintenance</b> .
2	<p>Click on the <b>Automatic Creation of Schedules</b> button (as pictured in the image below).</p>  <p style="text-align: center;"><b>Automatic Creation of Schedules</b></p>
3	On the <b>Automatic Creation of Schedules</b> page, specify a date range using the <b>Run From / To</b> (required) fields and other available filters to narrow the search. Click <b>Search</b> .

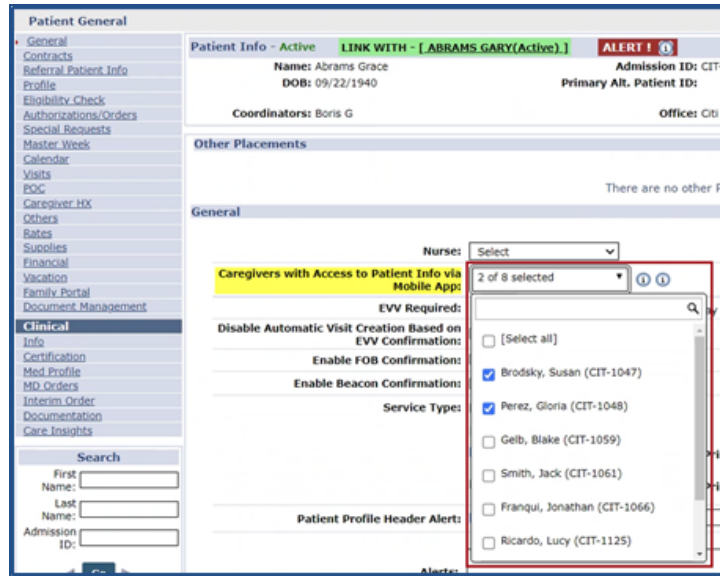
Step	Action								
	 <p style="text-align: center;"><b>Automatic Creation of Schedules Page</b></p>								
4	<p>The search returns EVV made within the specified date range (and any values entered in the available filter fields). The values in the <b>Call In / Out</b> represent the actual time the EVV was placed. The system rounds the time displayed in the <b>Call In / Out</b> fields to the nearest 15-minute interval to create a <b>Schedule</b> time. The system automatically attempts to pair two EVV.</p>  <p style="text-align: center;"><b>Search Results</b></p>								
5	<p>To generate visits using the EVV information, enter information in the following columns:</p> <table border="1" data-bbox="313 1047 1365 1535"> <thead> <tr> <th>Column/Field</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td><b>Schedule</b></td> <td>The system completes these fields by rounding the <b>Call In</b> and/or <b>Call Out</b> time of the EVV(s) to the nearest 15-minute interval.</td> </tr> <tr> <td><b>Service Code</b></td> <td>This field is required to create a scheduled visit. Caregivers can select the required <b>Service Code</b> from the Mobile App. Providers can verify and confirm that the correct Service Code is selected to prevent billing issues. <b>Note:</b> Caregivers cannot select a <b>Service Code</b> when multiple contracts/Service Codes exist for a visit confirmed via IVR. These visits show up in the Call Dashboard where Providers must select the applicable Service Code.</td> </tr> <tr> <td><b>Pay Code</b></td> <td>Insert the applicable Pay Code</td> </tr> </tbody> </table>	Column/Field	Description	<b>Schedule</b>	The system completes these fields by rounding the <b>Call In</b> and/or <b>Call Out</b> time of the EVV(s) to the nearest 15-minute interval.	<b>Service Code</b>	This field is required to create a scheduled visit. Caregivers can select the required <b>Service Code</b> from the Mobile App. Providers can verify and confirm that the correct Service Code is selected to prevent billing issues. <b>Note:</b> Caregivers cannot select a <b>Service Code</b> when multiple contracts/Service Codes exist for a visit confirmed via IVR. These visits show up in the Call Dashboard where Providers must select the applicable Service Code.	<b>Pay Code</b>	Insert the applicable Pay Code
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<b>Pay Code</b>	Insert the applicable Pay Code								
6	<p>When values for these fields are entered, the system highlights the EVV in orange to indicate that edits have been applied to a row. If all visit information is already populated, then select the checkbox in the left-most column.</p>								

Step	Action
	<p style="text-align: center;"><b>EVV ready to be Processed into Visits</b></p> <p><b>Note:</b> <i>Unhighlighted rows can also be selected to include in the visit creation process.</i></p>
7	When all the required information has been entered, click the <b>Process and Close</b> button to process the selected EVV and generate visits.
8	When the system completes the process the <i>Automatic Creation of Schedules: Visit Creation Status</i> window opens, detailing which visits were successfully generated and which were not. Visits that could not be created contain a <b>Problem</b> column, detailing why the system failed to create a visit. Click <b>Close</b> to exit.
	<p style="text-align: center;"><b>Visit Creation Status Window</b></p>
9	Navigate to <b>Billing &gt; Prebiling</b> .
10	Search for visits held in Prebiling due to an <i>Incomplete Confirmation</i> validation.
	<p style="text-align: center;"><b>Search by Incomplete Confirmation Validation</b></p>
11	In the search results, locate the Visits generated by the <b>Automatic Creation of Schedules</b> function that are missing a confirmation and click the edit “” icon to open the visit Window.

Step	Action
	<b>Visit with Missing (Incomplete) Confirmation</b>
12	<p>Select the <i>Visit Info</i> tab and enter either the <b>Visit Start Time</b> or <b>Visit End Time</b>, as well as values for the <b>New Reason</b> and <b>Action Taken</b> fields (if required). Click <b>Save</b> to finalize. The visit can now be invoiced.</p> <div data-bbox="370 514 1323 913" style="border: 1px solid black; padding: 5px;">  </div> <p style="text-align: center;"><b>Complete Confirmation for Visit</b></p>

## Assigning Caregivers to a Patient Profile

Caregivers must be registered in the Mobile App and set up in the system prior to Patient assignment. Caregivers must be assigned to each Patient on the *Patient General* page (**Patient > General**). Click on **Edit** to open fields. From the **Caregivers with Access to the Patient Info via Mobile App** dropdown field, select only the Caregivers who need access to the Patient. Once saved, assigned Caregivers can perform visits (*Scheduled* and *Unscheduled*) via the Mobile App.



**Patient General: Caregiver with Access to Patient Info Setting**

Caregivers must contact the Agency in cases where an EVV via the Mobile App cannot be completed to verify if this setting is enabled.

# Manually Confirming Visits

Visits that cannot be verified using EVV confirmation must be manually entered. Manual confirmation can be completed in bulk using the following functions: **Confirm Timesheet**, **Confirm Visits**, and **Edit Services**. Each of these functions are covered in the sections to follow.

## Confirm Timesheet Function

The **Confirm Timesheet** function is used to enter the schedule, confirmation, and duty information for visits confirmed via paper timesheets. Moreover, the **Reason**, **Action Taken**, and **Note** fields must be completed (required) when manually updating a visit for compliance purposes.

To search for visits using this function, the **Office**, **Caregiver**, and a **Week-Ending Date** must be specified; the **Patient** field is optional.

Complete the following steps when using the Confirm Timesheet function.

Step	Action																																																																																																																																												
1	Navigate to <b>Action &gt; Confirm Timesheet</b> .																																																																																																																																												
2	<p>Select the <b>Office</b>, <b>Caregiver Name/Code</b>, and <b>Week-Ending Date</b> (required) fields. Select the <b>Patient</b>, if applicable (optional). Click the <b>Go</b> button to generate visit information for the selected criteria.</p> <div data-bbox="295 1150 1398 1262" style="border: 1px solid black; padding: 5px;"> <p>Confirm Timesheet</p> <p>* Office(s): <input type="text" value="Long Island City"/> * Caregiver Name/Code: <input type="text" value="Anderson Rebecca (LIC-1003,100003) 101-1"/> * Week-Ending Date: <input type="text" value="2/13/2016"/> Patient: <input type="text" value="McBride Harriet"/></p> <p><small>(Enter: Last Name, First Name, Caregiver Code, Assignment ID, SSN(000-0000-0000))</small></p> <p style="text-align: center;"><input type="button" value="Go"/></p> </div> <p style="text-align: center;"><b>Confirm Timesheet Search Fields</b></p>																																																																																																																																												
3	<p>The system displays visit information for the Caregiver for the specified week. Complete the <b>Schedule / Temp</b>, <b>Override / Conf</b>, and <b>TS Req/App</b> fields to confirm or edit the Scheduled Visit Times, the actual Visit Times (according to the Timesheet) and approve the Timesheet.</p> <div data-bbox="367 1436 1321 1871" style="border: 1px solid black; padding: 5px;"> <p>Last 3 authorizations</p> <table border="1"> <thead> <tr> <th>Contract</th> <th>Auth. #</th> <th>From Date</th> <th>To Date</th> <th>Discipline</th> <th>Svc. Code</th> <th>Max units for Auth</th> <th>Type</th> <th>Period</th> <th>Max.</th> <th>S</th> <th>M</th> <th>T</th> <th>W</th> <th>T</th> <th>F</th> <th>S</th> <th>Remaining Units</th> </tr> </thead> <tbody> <tr> <td>Caring Hands LLC</td> <td>12345</td> <td>12/01/2015</td> <td>03/31/2016</td> <td>HHA</td> <td>HHA Standard</td> <td>N/A</td> <td>Hourly</td> <td>Daily</td> <td>0.00</td> <td>0.00</td> <td>4.00</td> <td>4.00</td> <td>4.00</td> <td>4.00</td> <td>4.00</td> <td>4.00</td> <td>0.00</td> </tr> </tbody> </table> <p>* Missed Visits will not be displayed on this page. Missed Visits can be viewed and edited from the Patient Calendar. * Schedule is disabled in case of multiple payers.</p> <p style="text-align: center;">PREVIOUS WEEK <b>2/7/2016-2/13/2016</b> NEXT WEEK &gt;</p> <table border="1"> <thead> <tr> <th>Get Pre-billing Status</th> <th>2/7/2016 (Sunday)</th> <th>2/8/2016 (Monday)</th> <th>2/9/2016 (Tuesday)</th> <th>2/10/2016 (Wednesday)</th> <th>2/11/2016 (Thursday)</th> <th>2/12/2016 (Friday)</th> <th>2/13/2016 (Saturday)</th> </tr> </thead> <tbody> <tr> <td>* Schedule/Temp:</td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text" value="1000"/> <input type="text" value="1400"/> <input checked="" type="checkbox"/></td> <td><input type="text"/></td> <td><input type="text" value="1000"/> <input type="text" value="1400"/> <input type="checkbox"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td>Call In/Out:</td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td>POC Compliance:</td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td>Override/Conf:</td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text" value="1000"/> <input type="text" value="1400"/> <input checked="" type="checkbox"/> 04:00</td> <td><input type="text"/></td> <td><input type="text" value="1000"/> <input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td>TS Req/App:</td> <td>Req: <input type="checkbox"/> App: <input type="checkbox"/></td> <td>Req: <input type="checkbox"/> App: <input type="checkbox"/></td> <td>Req: <input checked="" type="checkbox"/> App: <input checked="" type="checkbox"/></td> <td>Req: <input type="checkbox"/> App: <input type="checkbox"/></td> <td>Req: <input checked="" type="checkbox"/> App: <input checked="" type="checkbox"/></td> <td>Req: <input type="checkbox"/> App: <input type="checkbox"/></td> <td>Req: <input type="checkbox"/> App: <input type="checkbox"/></td> </tr> <tr> <td>Contract:</td> <td><input type="text"/></td> <td><input type="text"/></td> <td>Caring Hands LLC</td> <td><input type="text"/></td> <td>Caring Hands LLC</td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td>Pri. 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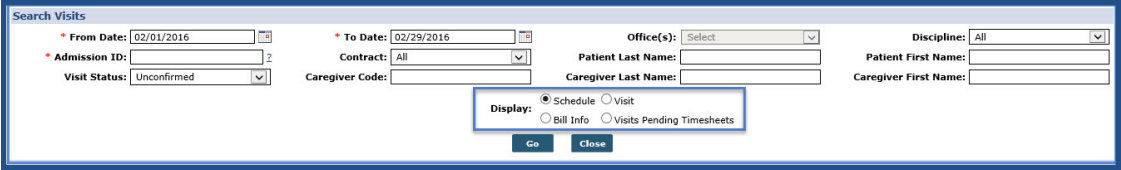

Step	Action																																																																																										
	<p align="center"><b>Search Results</b></p> <p><i>Note: If the Caregiver did not have a visit on a certain day, or the visit is in the future, the fields are unavailable. Use the <b>Previous Week</b> and <b>Next Week</b> icons above the search results to navigate to other Caregiver visits (worked by or scheduled for).</i></p>																																																																																										
4	<p>Click on the <a href="#">Duties</a> link at the bottom of the page to enter POC Duties for the applicable visit for the selected week. Duties may only be applied to scheduled visits.</p> <p>Click the left-side checkbox to apply duties for all editable visits or click on individual days to specify which duties were performed (or refused) individually.</p> <div data-bbox="326 655 1365 1035" style="border: 1px solid black; padding: 5px;"> <p align="center">Caregiver: Anderson Rebecca      Weekend Date: 2/13/2016      Patient: McBride Harriet</p> <p> <span style="color: green;">■</span> Task in POC  <span style="color: blue;">■</span> Task entered by phone  <small>* Visits must be confirmed before duties can be entered.</small> </p> <table border="1"> <thead> <tr> <th>Duty Name (Minutes)</th> <th>Frequency</th> <th>2/7/2016 (Sunday)</th> <th>2/8/2016 (Monday)</th> <th>2/9/2016 (Tuesday)</th> <th>2/10/2016 (Wednesday)</th> <th>2/11/2016 (Thursday)</th> <th>2/12/2016 (Friday)</th> <th>2/13/2016 (Saturday)</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> 100 - Bathing (30)</td> <td>SMTWTFS</td> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td><input checked="" type="checkbox"/> 101 - Bathroom Assistance (60)</td> <td>SMTWTFS</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input checked="" type="checkbox"/> 102 - Grooming (60)</td> <td>SMTWTFS</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input checked="" type="checkbox"/> 103 - Cooking (60)</td> <td>SMTWTFS</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input checked="" type="checkbox"/> 104 - Cleaning (30)</td> <td>SMTWTFS</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input checked="" type="checkbox"/> 105 - Pet Care (0)</td> <td>SMTWTFS</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/> 711 - Weight (0)</td> <td>SMTWTFS</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Duty Totals:</td> <td></td> <td>0(00:00)</td> <td>0(00:00)</td> <td>6(04:00)</td> <td>0(00:00)</td> <td>6(04:00)</td> <td>0(00:00)</td> <td>0(00:00)</td> </tr> <tr> <td>Visit Duration:</td> <td></td> <td>(00:00)</td> <td>(00:00)</td> <td>(00:00)</td> <td>(00:00)</td> <td>(00:00)</td> <td>(00:00)</td> <td>(00:00)</td> </tr> </tbody> </table> <p align="center"><b>Duty List</b></p> <p><i>Note: Duties that are part of the Patient Plan of Care display in <b>green</b>. Those entered by the Caregiver via EVV display in <b>blue</b>.</i></p> </div>	Duty Name (Minutes)	Frequency	2/7/2016 (Sunday)	2/8/2016 (Monday)	2/9/2016 (Tuesday)	2/10/2016 (Wednesday)	2/11/2016 (Thursday)	2/12/2016 (Friday)	2/13/2016 (Saturday)	<input checked="" type="checkbox"/> 100 - Bathing (30)	SMTWTFS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> 101 - Bathroom Assistance (60)	SMTWTFS	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> 102 - Grooming (60)	SMTWTFS	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> 103 - Cooking (60)	SMTWTFS	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> 104 - Cleaning (30)	SMTWTFS	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> 105 - Pet Care (0)	SMTWTFS	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 711 - Weight (0)	SMTWTFS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Duty Totals:		0(00:00)	0(00:00)	6(04:00)	0(00:00)	6(04:00)	0(00:00)	0(00:00)	Visit Duration:		(00:00)	(00:00)	(00:00)	(00:00)	(00:00)	(00:00)	(00:00)
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5	<p>Once all time and duty information is entered, click the <b>Save</b> button to apply the changes.</p>																																																																																										
6	<p>To ensure the visit(s) is confirmed, navigate to either the <b>Patient</b> or <b>CaregiverCalendar</b> and review the relevant dates.</p> <div data-bbox="673 1325 1024 1539" style="border: 1px solid black; padding: 5px; width: fit-content; margin: auto;"> <p align="center"> <span style="color: green; font-weight: bold;">S:1000-1400</span> <span style="background-color: orange; padding: 2px;">T</span> <span style="float: right;">9</span>  <span style="color: green;">V:1000-1400</span>  <span style="color: green;">B: N (04:00)</span>  <span style="color: green;">Anderson</span>  <span style="color: green;">Rebecca</span> </p> </div> <p align="center"><b>Visit Confirmed</b></p>																																																																																										

## Confirm Visits Function

The **Confirm Visit** function is used to manually confirm visits in bulk. This function displays all visits applicable to the search parameters and is strictly for confirming visits only. In essence, one cannot confirm a Timesheet or enter POC Duties from this page.

**Note:** Use the *Confirm Timesheet* page when a visit requires advanced verification.

Complete the following steps when using the Confirm Visits function.

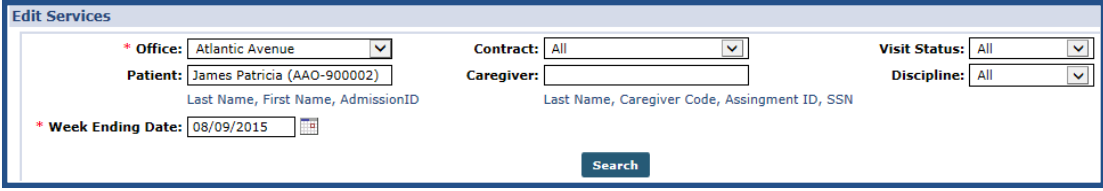
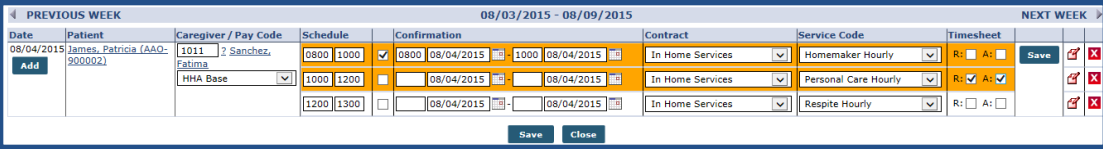

Step	Action
1	<p>Navigate to <b>Action &gt; Confirm Visits</b> and specify a date range using the <b>From/To Date</b> fields. The <b>Display</b> value selected dictates the information to view in the search results. Once search parameters are chosen, click the <b>Go</b> button.</p>  <p style="text-align: center;"><b>Display Values</b></p>
2	<p>As illustrated in the image below, the <b>Display</b> value selected is <b>Visit</b>. The search results provide information available on the Visit tab as well as any open fields. Enter or edit the applicable information.</p> <p>When values for these fields are entered, the system highlights the EVV in orange indicating that there is sufficient information to generate a visit.</p> <p>Select the checkbox in the left-most column for records where all the visit information is already populated. Doing so does not highlight the EVV but includes it in the visit processing.</p>  <p style="text-align: center;"><b>Display Visits</b></p>
3	<p>Once complete, click the <b>Save</b> button to update all selected records in bulk.</p>



## Edit Services Function

The **Edit Services** function is used to divide a single visit into multiple sections, each with an individual Service Code. This is useful when each service provided during a visit must be billed separately. Each new visit (or division of the initial visit) can be confirmed from this page.

Complete the following steps to use the Edit Services function.

Step	Action
1	Navigate to <b>Visit &gt; Edit Services</b> .
2	<p>Specify the <b>Office</b> and <b>Week Ending Date</b> (required) fields. Enter either a <b>Patient</b> or <b>Caregiver</b> to update (optional). Click <b>Search</b> to continue.</p>  <p style="text-align: center;"><b>Search Filters</b></p>
3	<p>In the search results, click on the <b>Add</b> button (under the <b>Date</b> column) to create a new visit or division.</p>  <p style="text-align: center;"><b>Edit Services</b></p>
4	Enter a new <b>Schedule Time</b> , <b>Confirmation</b> , <b>Service Code</b> , and <b>Timesheet</b> for the new visit.
5	<p>Once all changes have been made, click the <b>Save</b> button to update information in bulk for all adjusted visits. Changes may be reviewed on the Patient's Calendar (as illustrated on the image).</p>  <p style="text-align: center;"><b>Divided Visits</b></p>

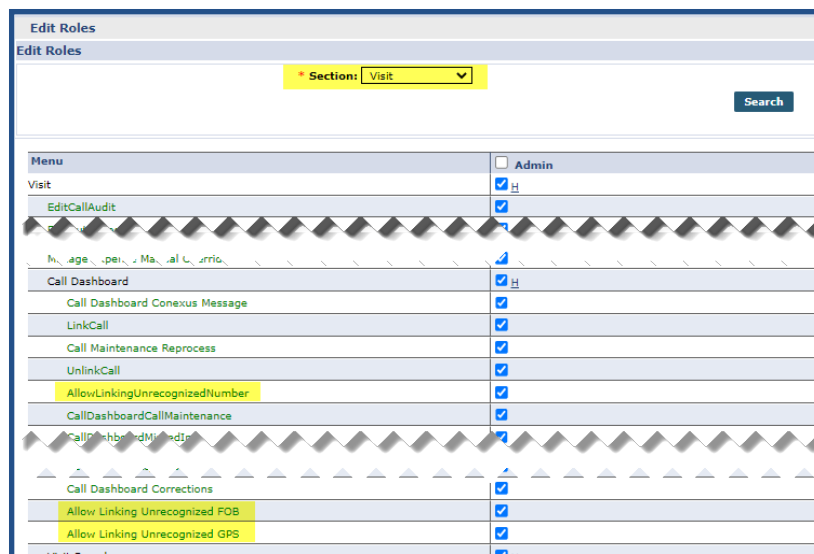


## Permissions for Linking EVV

The following permissions allow Providers to manage EVV linking to the correct modality. These three permissions are also used to control specific **Status** values in the Call Maintenance function to reduce the number of EVV on the Call Dashboard defined as *Unknown*.

- **Allow Linking Unrecognized Number** controls linking unrecognized numbers. When activated, users can link EVV with and unrecognized number to a visit. This permission controls the following **Status** values:
  - Phone Number not Found
  - Call ID not Available
- **Allow Linking Unrecognized FOB** links unrecognized FOBs when EVV is placed using IVR or the Mobile App. When activated, users can link EVV with an unrecognized FOB to a visit. This permission controls the following **Status** values:
  - Invalid FOB Passcode
  - Expired FOB Passcode
- **Allow Linking Unrecognized GPS** links unrecognized GPS, when EVV is placed via the Mobile App. When activated, users can link EVV even if the GPS does not correspond to a Patient Address on file. This permission controls the following **Status** values:
  - GPS Signal Out of Range

These permissions are managed via the User Management functionality. To enable or disable these permissions, navigate to the *Edit Roles* page (**Admin > User Management > Edit Roles**). Select *Visit* from the **Section** dropdown field and the applicable **Roles**. These permissions are located under the Call Dashboard section, as seen in the following image.



Permissions: Allow Linking Unrecognized Number/FOB/GPS



# Tracking Location Where EVV is Performed

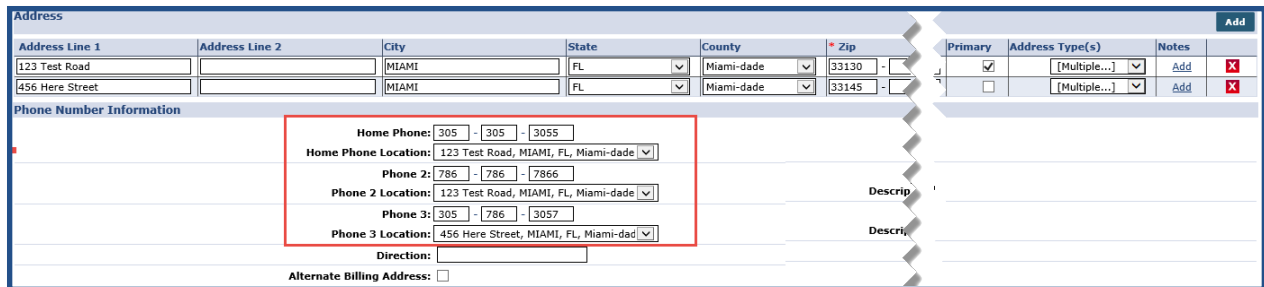
**Tip:** You can press **Ctrl-F** on your keyboard to search this topic.

To accommodate Electronic Visit Verification (EVV) state mandates required by the Cures Act, the system has been updated to capture EVV at the location where services are performed. Providers can associate a Patient’s phone number, FOB, or Beacon device to a specific address on the Patient Profile to indicate where EVV is captured. In turn, the address is saved upon Visit confirmation.

**Note:** Not valid for “Billing Only” addresses.

## Associate Patient Address with Phone Number

To associate a Patient address with a phone number, navigate to the applicable *Patient Profile* page (**Patient > Profile**) and click the **Edit** button. On the *Phone Number Information* section, **Phone Location** fields have been added under each **Phone** field (**Home Phone**, **Phone 2**, and **Phone 3**). To connect the phone to an address, select the applicable address (previously entered in the *Address* section) from the **Phone Location** dropdown (as seen in the image below).



Address Line 1	Address Line 2	City	State	County	Zip	Primary	Address Type(s)	Notes
123 Test Road		MIAMI	FL	Miami-dade	33130	<input checked="" type="checkbox"/>	[Multiple...]	Add X
456 Here Street		MIAMI	FL	Miami-dade	33145	<input type="checkbox"/>	[Multiple...]	Add X

Phone Number	Phone Location	Description
Home Phone: 305 - 305 - 3055	Home Phone Location: 123 Test Road, MIAMI, FL, Miami-dade	
Phone 2: 786 - 786 - 7866	Phone 2 Location: 123 Test Road, MIAMI, FL, Miami-dade	
Phone 3: 305 - 786 - 3057	Phone 3 Location: 456 Here Street, MIAMI, FL, Miami-dad	

Associating a Phone Number with an Address

Note that a Patient Address can be associated to multiple phone numbers; however, each phone number can only be associated to one address. To clear out an address association, select the “Select” value from the dropdown and save.

Any Patient **Phone Numbers** left unselected default to the **Primary** address on record on the Patient Profile.

Once saved, the **Phone Location** fields are populated with associated addresses, viewed on the *Patient Profile* page (as illustrated in the image below).

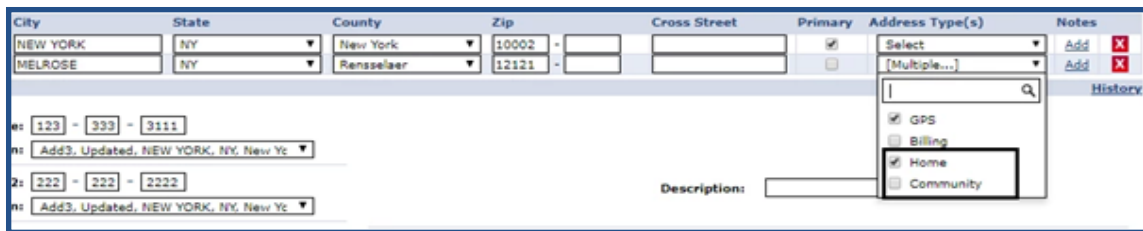
Phone Number Information	
<b>Home Phone:</b>	111-111-1111
<b>Home Phone Location:</b>	AURORA, SD, Brookings, 57002, Canarys street
<b>Phone 2:</b>	222-111-1111
<b>Phone 2 Location:</b>	NEW YORK, NY, New York, 10001
<b>Phone 3:</b>	333-111-1111
<b>Phone 3 Location:</b>	AURORA, SD, Brookings, 57002, Canarys street
<b>Direction:</b>	
<b>Alternate Billing Address:</b>	No

Associate Phone Numbers with Addresses

## Updates to Patient Address Types

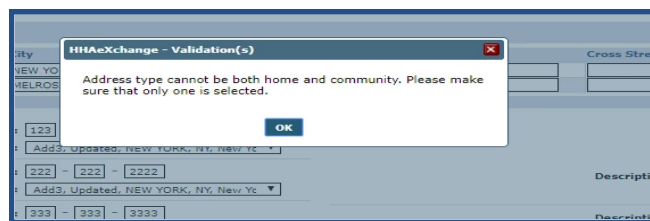
*Home* and *Community* options have been added to **Address Types** to allow further categorization of the Patient address. Although **Address Types** is a multi-select column, the options of *Home* and *Community* cannot be selected together. In essence, a Patient address cannot be both Home and Community.

If **Address Type** is unselected for any address entered, then the system defaults to the *Home* value capturing where the service was performed.



The screenshot shows a form with fields for City, State, County, Zip, Cross Street, Primary, and Address Type(s). The Address Type(s) dropdown is open, showing options for GPS, Billing, Home, and Community. The Home and Community options are checked. Below the form, there are two address entries, each with a 'Description' field.

Home and Community Address Types



The screenshot shows a validation error dialog box titled 'HHAexchange - Validation(s)'. The message reads: 'Address type cannot be both home and community. Please make sure that only one is selected.' There is an 'OK' button at the bottom of the dialog.

Address Type Validation Error

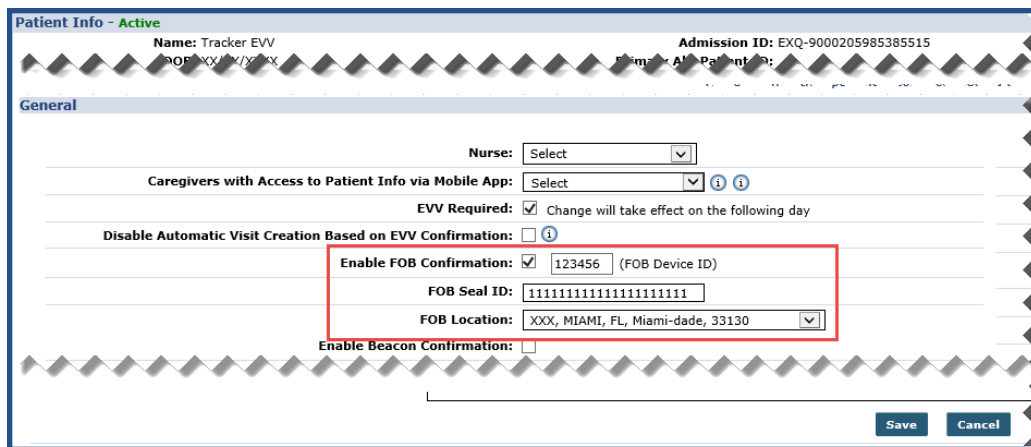
**Note:** For Linked Contracts, Payer permission must be granted to the Provider to edit Address fields.

## Associating a Patient Address with a FOB or Beacon Device

### FOB Device

If a Patient has been set up with a FOB device, then the Patient Addresses can be associated to the FOB device in the *Patient General* page (**Patient > General**). An **FOB Location** field has been added to associate an address to the device. On the **FOB Location** dropdown, select the applicable address (as entered in the *Patient Profile* page).

Only one address can be associated with the FOB device.

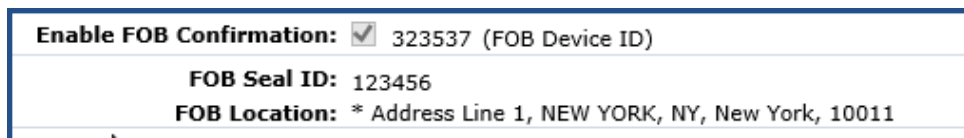


The screenshot shows the 'Patient Info - Active' page with the 'General' tab selected. The 'Enable FOB Confirmation' section is highlighted with a red box. The fields are as follows:

Enable FOB Confirmation:	<input checked="" type="checkbox"/>	123456 (FOB Device ID)
FOB Seal ID:	11111111111111111111111111111111	
FOB Location:	XXX, MIAMI, FL, Miami-dade, 33130	

FOB Location: Associated Address

Once saved, the **FOB Location** field is populated with the associated address, viewed on the *Patient General* page (as illustrated in the image below).



The screenshot shows the 'Enable FOB Confirmation' section after saving. The fields are as follows:

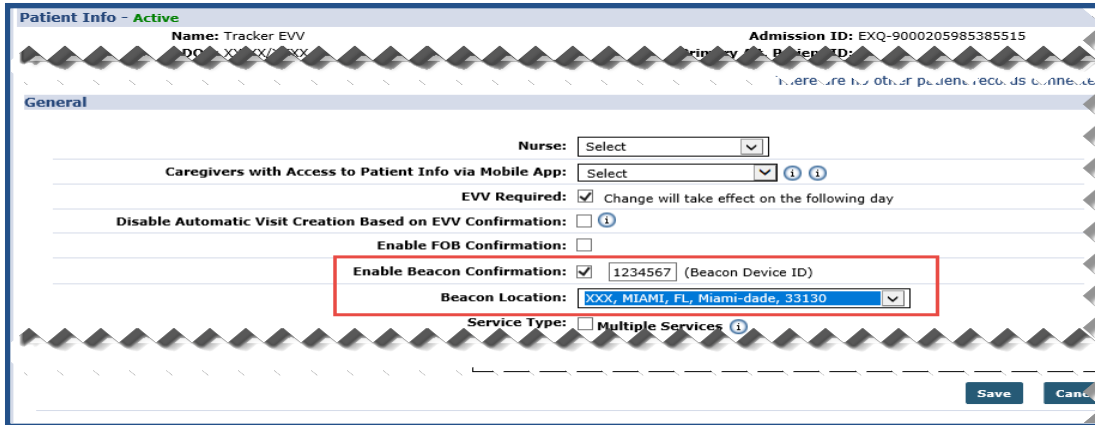
Enable FOB Confirmation:	<input checked="" type="checkbox"/>	323537 (FOB Device ID)
FOB Seal ID:	123456	
FOB Location:	* Address Line 1, NEW YORK, NY, New York, 10011	

Associated Address with FOB Device

## Beacon Device

If a Patient has been set up with a Beacon device, then the Patient Addresses can be associated to the Beacon device in the *Patient General* page (**Patient > General**). A **Beacon Location** field has been added to associate an address to the device. On the **Beacon Location** dropdown, select the applicable address (as entered in the *Patient Profile* page).

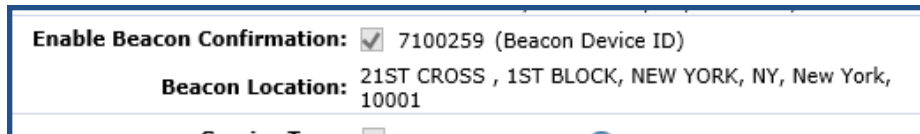
Only one address can be associated with the Beacon device.



The screenshot shows the 'Patient Info - Active' page for a patient named 'Tracker EVV'. The 'General' tab is selected. The 'Beacon Location' dropdown menu is open, showing the selected address: 'XXX, MIAMI, FL, Miami-dade, 33130'. The 'Enable Beacon Confirmation' checkbox is checked, and the 'Beacon Device ID' is '1234567'. Other fields include 'Nurse', 'Caregivers with Access to Patient Info via Mobile App', 'EVV Required', 'Disable Automatic Visit Creation Based on EVV Confirmation', and 'Enable FOB Confirmation'. The 'Service Type' is set to 'Multiple Services'. 'Save' and 'Cancel' buttons are visible at the bottom right.

Associating a Beacon to Patient Address

Once saved, the **Beacon Location** field is populated with the associated address, viewed on the *Patient General* page (as illustrated in the image below).



The close-up shows the 'Enable Beacon Confirmation' checkbox checked with the device ID '7100259'. The 'Beacon Location' field is populated with the address: '21ST CROSS , 1ST BLOCK, NEW YORK, NY, New York, 10001'.

Associated Address with Beacon Device

## Updating or Deleting an Address

When an address is updated or removed from the Patient Profile page, the system removes the association with the applicable FOB or Beacon device.



## Manually Linking Calls

### Call Maintenance

The system captures the associated Patient address when a Call In or Call Out is made for a Patient visit. If an error occurs during this process, then the call goes to the Call Dashboard to be resolved. Use the [Link](#) option under the **Call Type** column on the Call Maintenance screen to store the confirmed EVV and the associated Patient address (as illustrated in the image below). The system stores the address according to the EVV modality (Phone, FOB, GPS) used to Call In or Out.

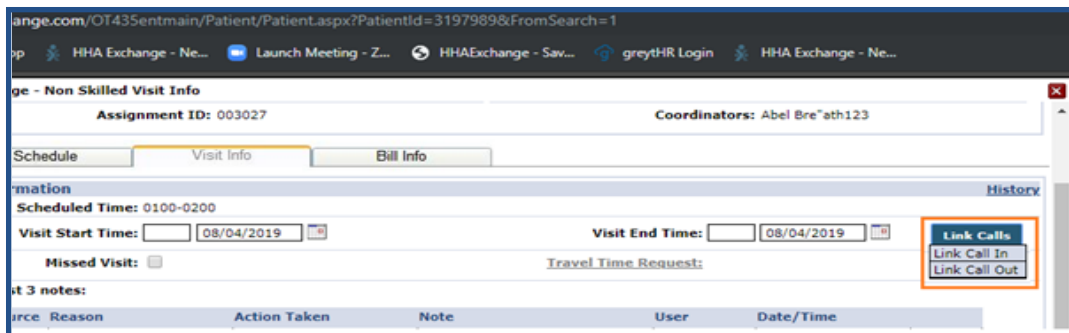


Caregiver Code	Caregiver Name	Office Name	Caregiver Phone	Caregiver Team	Patient Name	Call Date	Call Time	Call Type	Caller ID
140	Jensen David	HHAExchange Office Excellence	Phone1 : 111-222-9999	Albert Noble	phi one patient	11/11/2019	0945-1000	Link	NA
140	Jensen David	9100205	phi one patient	Albert Noble	Phone1 : 333-333-3333 Phone2 : 999-111-9999 Phone3 : 111-222-9999	11/11/2019	1000-1015	Link	
140	Jensen David	Hiru	Linked Hiru	Abel Bre"ath123	Phone1 : 121-313-1321 Phone2 : 454-654-5646	11/11/2019	0130-0145	Edit	

Linking on the Call Dashboard

### Visit Info Tab

The same occurs on the *Visit Info* tab. Use the **Link Calls** button (to the right of the **Visit End Time** field; (as seen in the following image) to link *Call In* and/or *Call Out*. Once linked, the system stores the associated Patient address according to the EVV modality (Phone, FOB, GPS) used.



Assignment ID: 003027      Coordinators: Abel Bre"ath123

Schedule    Visit Info    Bill Info

Scheduled Time: 0100-0200

Visit Start Time: 08/04/2019      Visit End Time: 08/04/2019

Missed Visit:       Travel Time Request:

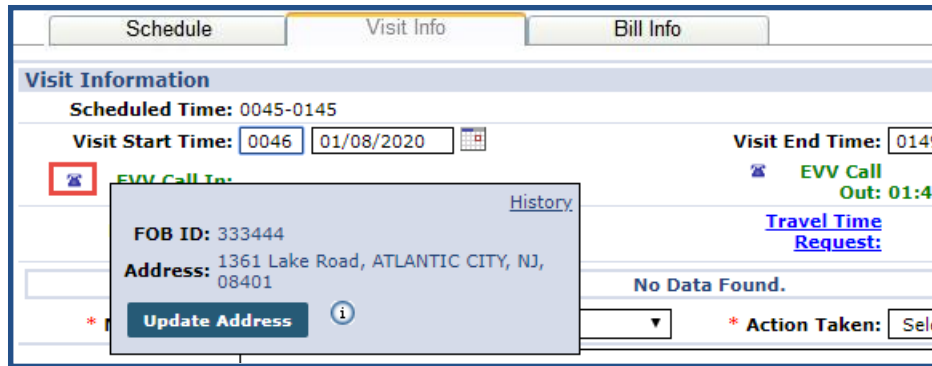
Link Calls  
Link Call In  
Link Call Out

Source	Reason	Action Taken	Note	User	Date/Time
Visit 3 notes:					

Linking via Visit Info Tab

## Viewing a Stored Patient Address

After a call is successfully linked, the address (if available) is stored and visible in the *Visit Info* tab of each visit along with the EVV ID used for the confirmation. Hover over the telephone icon in respective **EVV Call In** or **EVV Call Out** fields to view the stored address (as seen in the following image).



Viewing a Stored Address in the Visit Info Tab

**Note:** In rare occasions, (however, possible) a Patient visit may start in one location and end in another.

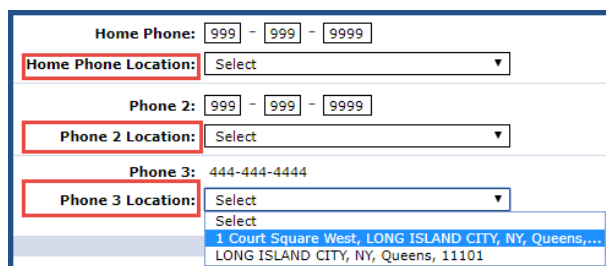
The absence of the telephone icon may indicate that the visit is either manually confirmed or not yet confirmed.

At times, an **EVV ID** and confirmation time is present for a visit without an address. This indicates that there is no address associated with the EVV method used (Phone, FOB, or Beacon). In this case, an address can be associated and then the visit can be manually updated as described below.

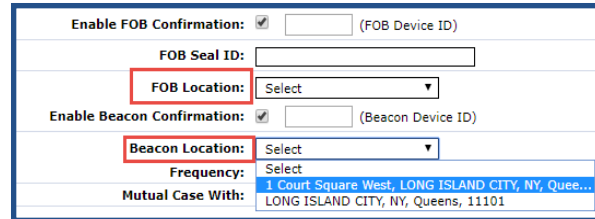
## Manually Updating a Stored Patient Address

Stored addresses may need to be manually updated if the address associated with an EVV method is incorrect (and stored for a confirmed visit); or no address is associated to the EVV method used (resulting in a missing address).

To manually update a stored Patient Address, navigate to the *Patient Profile* page (**Patient > Profile**) and click on the **Edit** button. On the *Phone Number Information* section, select the applicable **Phone** field and the correct stored address.



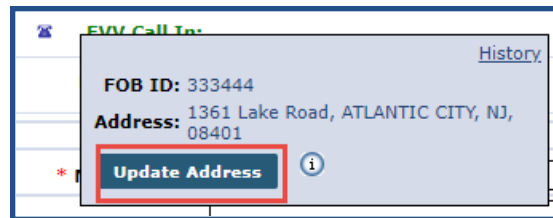
To associate the correct address to an EVV Method, navigate to the *Patient General* page (**Patient > General**). From the **FOB Location** and/or **Beacon Location** field dropdown, select the correct stored address.



The screenshot shows a configuration form with the following fields:

- Enable FOB Confirmation:  (FOB Device ID)
- FOB Seal ID:
- FOB Location:  (highlighted with a red box)
- Enable Beacon Confirmation:  (Beacon Device ID)
- Beacon Location:  (highlighted with a red box)
- Frequency:
- Mutual Case With:  (highlighted with a blue selection bar)

Once the proper address is associated, navigate to the applicable *Visit Info* tab and hover over the telephone icon to access the confirmed address window. Click on the **Update Address** button. HHAX finds the address matching the **EVV ID** used for confirmation.



The screenshot shows a confirmation window titled "EVV Call In:" with the following information:

- History
- FOB ID: 333444
- Address: 1361 Lake Road, ATLANTIC CITY, NJ, 08401
- Update Address** button (highlighted with a red box)
- Information icon (i)

**Note:** Stored addresses can also be removed using the **Update Address** button.

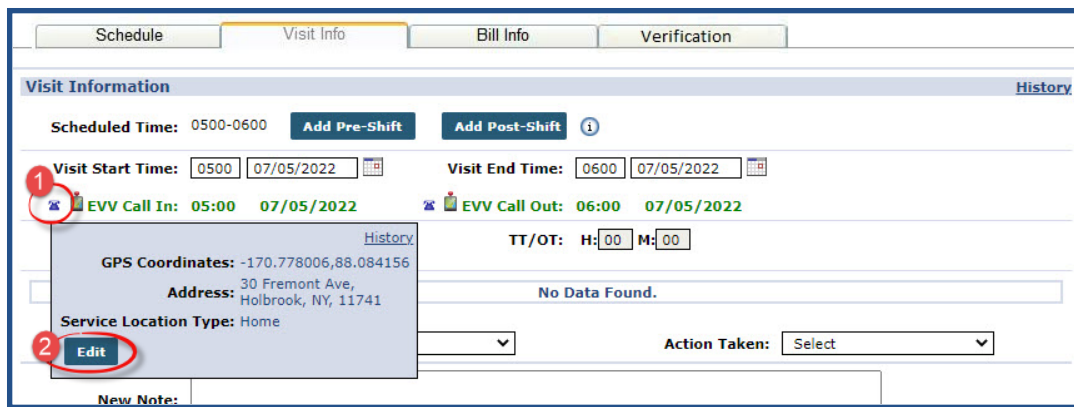
A confirmation window opens to confirm the address association. Click **OK** to refresh and store the address for the visit. If the address is incorrect or missing for the Call IN, it is likely incorrect or missing for the Call OUT and vice-versa. Be sure to check both the **EVV Call In** address and **EVV Call Out** address for accuracy.

## Service Location Edits (Cures Act Requirements)

The Cures Act requires that the service location for a visit be accurately captured/recorded in the system to be compliant. When a visit is confirmed, this information is ultimately sent to the Payer and Aggregation applications. Typically, editing the service location (address) for a particular visit may not be permissible for Providers managing certain Linked Contracts; therefore, hindering this compliance requirement.

The system has been updated to allow Providers to edit the service location directly on the *Visit Info* tab for the affected visit. This correction can be completed for Clock In or Clock Out, as pictured in the following image.

To edit, click on the phone icon (☎) to the left of the confirmed EVV (in **green** font) in the *Visit Info* tab. A popup screen appears displaying the details captured in the initial EVV. Click on the **Edit** button on the popup screen.



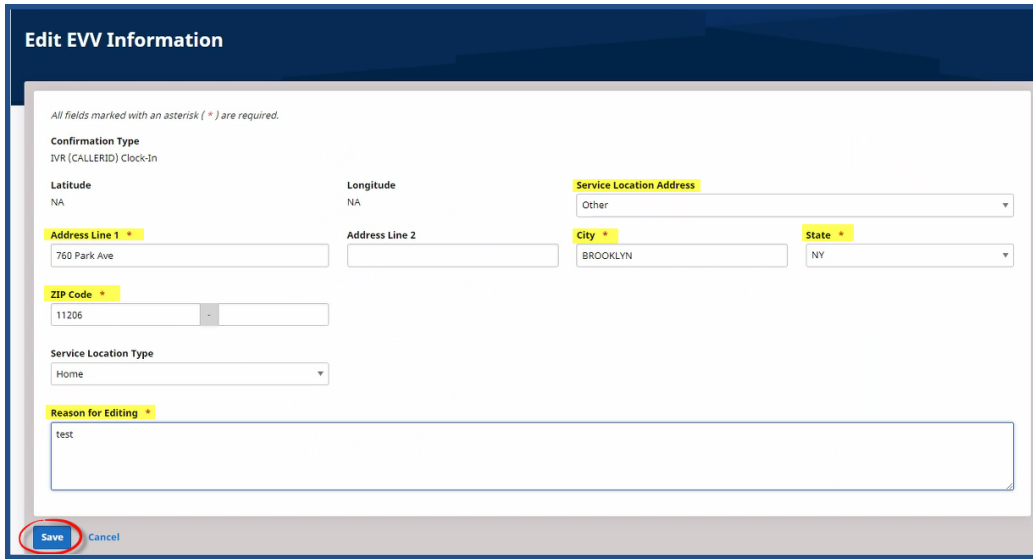
The screenshot shows the 'Visit Info' tab with the following details:

- Schedule:** 0500-0600
- Visit Start Time:** 0500 on 07/05/2022
- Visit End Time:** 0600 on 07/05/2022
- EVV Call In:** 05:00 on 07/05/2022
- EVV Call Out:** 06:00 on 07/05/2022
- TT/OT:** H:00 M:00
- GPS Coordinates:** -170.778006,88.084156
- Address:** 30 Fremont Ave, Holbrook, NY, 11741
- Service Location Type:** Home

A popup window is open over the EVV information, containing the same details and an **Edit** button circled in red. A red circle with the number '1' is around the phone icon next to the EVV Call In, and a red circle with the number '2' is around the **Edit** button.

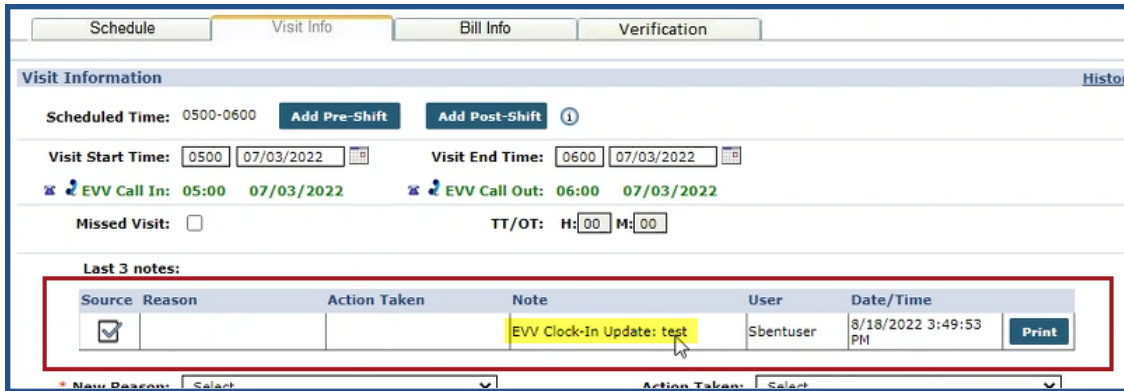
Visit Info Tab: EVV Information

The *Edit EVV Information* window opens. In the image below, the **Service Location Address** is selected as *Other* opening fields to complete. Edit the necessary information to include the required fields denoted with a red asterisk. Click **Save** to finalize.



**Edit EVV Information Window**

Once saved, the change appears as a Note in the *Visit Info* tab, as seen in the following image.



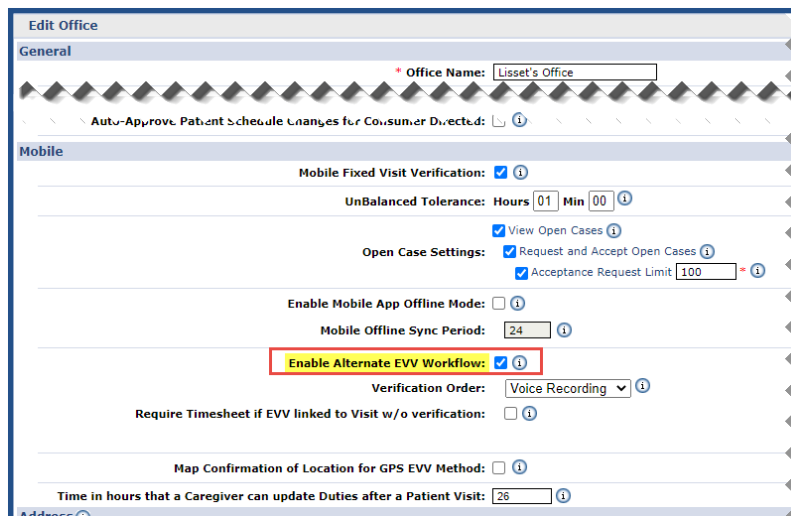
Source	Reason	Action Taken	Note	User	Date/Time
<input checked="" type="checkbox"/>			EVV Clock-In Update: test	Sbentuser	8/18/2022 3:49:53 PM

**Visit Info Note: Service Location Change**

# Patient Voice Verification on IVR Clock Out

The **Alternate EVV Verification Workflow** feature includes the IVR application allowing an Agency to request capturing a Patient’s Voice Verification during Clock Out. This feature (introduced as a Mobile App\* feature) allows Providers to use an alternate EVV workflow to achieve state-required compliance (such as when Patient Signature and/or Patient Voice Recording is required to verify visit details).

Both the IVR and Mobile EVV functionality for the **Alternate EVV Workflow** is enabled in the *Edit Office* page (**Admin > Office Setup > Edit Office**) in the *Mobile* section. To enable, select the **Enable Alternate EVV Workflow** checkbox.



**Edit Office: Enable Alterante EVV Workflow**

Once the **Enable Alternate EVV Workflow** checkbox is selected, the following options become available to select:

- the **Verification Order** dropdown field only applies to the Mobile App\* functionality. The IVR system ignores this setting and always uses **Voice Recording** to capture the **Patient’s Signature**; and
- the **Require Timesheet if EVV linked to Visit w/o verification** checkbox to require a Timesheet from the Caregiver if a Patient does not verify the visit.

\*Refer to the [Mobile App \(Agency\) category](#) for details specific on the Mobile App functionality.

## Unsupported Workflows

The following features are not available for the Alternate EVV Workflow functionality:

- FOB
- Consecutive Shifts
- Consecutive Shifts for Multi-Service Patient
- Consecutive Shifts for Linked Patients
- Cluster Calls
- Mutual Shift

## Alternate EVV Workflow

The Alternate EVV Workflow for IVR differs significantly from existing Clock-Outs in that the Caregiver initiates the confirmation then hands the phone over to the Patient for him/her to provide responses. The following table provides the steps in the EVV Alternate Workflow IVR Clock-Out process, describing how information is captured to include the type of service, duration, and voice confirmation by the Patient.

EVV Alternative Workflow: IVR Clock-Out Steps	
Step	Description
1	<p><b>Initiation of the Alternate IVR Workflow</b></p> <p>The Caregiver enters all duties as customary and then presses <b>000</b> to proceed to the Voice Verification portion of the call.</p>
2	<p><b>Caregiver Service Verification</b></p> <p>The Caregiver hears the name of the discipline for the visit. The Caregiver <i>confirms</i> or <i>denies</i> that the scheduled Discipline was provided during the visit by pressing <b>1</b> for <u>Yes</u> or <b>0</b> for <u>No</u>.</p> <p><i>Note: If there is no matching visit for the Clock Out, then the system does not present the Caregiver with the visit Discipline and bypasses this portion of the confirmation.</i></p>
3	<p><b>Hand Phone to Patient</b></p> <p>After confirming (<b>1</b> for Yes) or denying (<b>0</b> for No) the service performed, the Caregiver continues to indicate whether the Patient is able to perform the verification by pressing <b>1</b> for Yes or <b>0</b> for No.</p> <ul style="list-style-type: none"> <li>• If <u>Yes</u>, then the Caregiver hands the phone to the Patient to continue the verification process. The Patient can then confirm the accuracy of the service performed. The system presents the Patient with visit's Discipline, where the Patient presses <b>1 (Yes)</b> to <u>confirm</u> or <b>0 (No)</b> to <u>deny</u>.</li> <li>• If <u>No</u>, then the Caregiver indicates that the Patient is not able to confirm and the call ends.</li> </ul>
4	<p><b>Duration Verification</b></p> <p>The Patient is then prompted to confirm (<b>1</b> for Yes) or deny (<b>0</b> for No) the Start Time, End Time, and Visit Duration.</p> <p><i>Note: If there is no matching visit for the Clock Out, or if a corresponding Clock-In cannot be identified, then the system does not present the visit start time or duration for the Patient to confirm and this portion of the confirmation is</i></p>

EVV Alternative Workflow: IVR Clock-Out Steps		
		<i>bypassed.</i>
5	Voice Verification	<p>The Patient is then prompted to verbally record his/her name and the Date of Service. After recording, the Patient presses <b>1</b> to proceed or <b>0</b> to hear the recording again. To re-record, press the * key.</p> <p><b>Note:</b> <i>The Patient is able to provide a voice confirmation regardless of the system's ability to match a visit or a Clock-In.</i></p>
6	End of the IVR Call Flow	After completing the voice verification portion of the call, the system automatically ends the Clock Out.



## End to End Call Flow

The following table provides the chronological steps heard on the IVR call.

Step	Action	What the Caregiver/Patient hears...
1	Caregiver calls the IVR line and presses 2 to Call Out.	Welcome to HHAExchange. Press 1 for call in. Press 2 for call out.
2	Caregiver enters and confirms their Assignment ID	Enter your Assignment ID.  You have entered [Time And Attendance PIN entered by Caregiver]. If it is correct, press 1 or press 0 to reenter.
3	The Caregiver records all duties performed	Enter Duty ID. Next Duty ID (Continue until complete, see next step)
4	The Caregiver enters "000" to complete duty entry	N/A
5	The Caregiver confirms the service performed (Discipline; for example, HHA, PCA, etc.)	The service performed was [Discipline as per Service Code]. Press 1 to confirm, press 0 to deny.
6	The Caregiver indicates if the Patient can participate in verification	Press 1 and hand phone to the Patient for Voice Verification. Press 0 if the Patient is not able to perform Voice Verification.
7	The Patient confirms the service performed (for example, HHA, PCA, etc.)	The service performed was [discipline of service code]. Press 1 to confirm, press 0 to deny"
8	The Patient verifies the Visit Duration	The Visit started at [Call In Time], ended at [Call Out Time], and lasted [duration of visit]. Press 1 to confirm, press 0 to deny, or press * to repeat.
9	The Patient provides a Voice Signature	Please say your full name and today's date.  Press 1 to proceed, press 0 to hear recording, or press * to record again.
10	The Clock Out ends	Your call has been registered successfully.

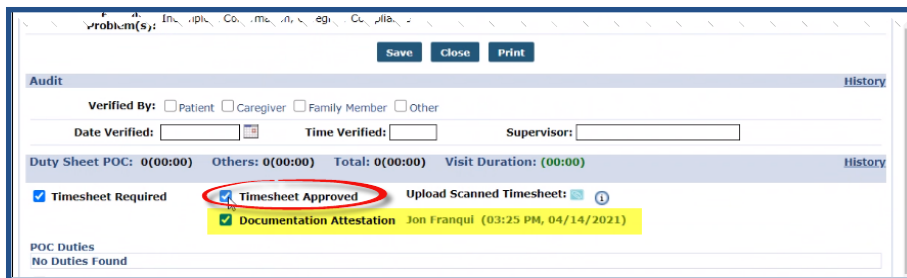
# Documenting an Alternate EVV Workflow Verification

On the Visit Info tab, the **Documentation Attestation** field captures an additional layer of confirmation for an Agency to review timesheet information supporting a visit that is manually confirmed or edited directly in the system. The following must be enabled for this field to become available:

1. The **Enable Alternate EVV Workflow** and the **Require Timesheet if EVV linked to Visit w/o verification** checkboxes must be selected in the *Mobile* section of the *Edit Office* page (**Admin > Office Search**).
2. The **Timesheet Approved** checkbox must be selected in the *Visit Info* tab.

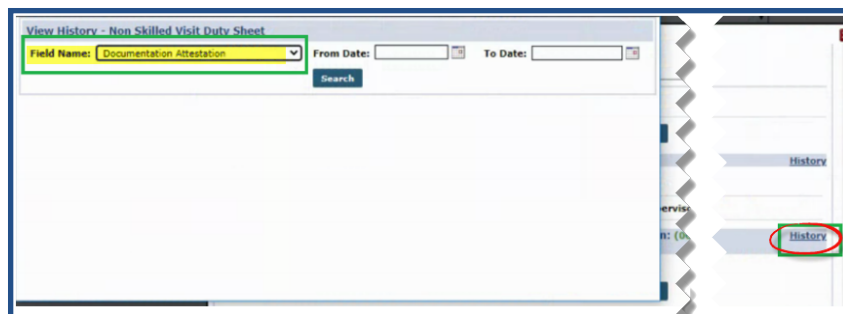
The **Documentation Attestation** feature applies to both *Skilled* and *Non-Skilled* visits. When the **Timesheet Approved** checkbox is selected, the system automatically selects the **Document Attestation** checkbox displaying the attessor details (*System User with Time/Date*), as seen in the image below.

This functionality is applicable throughout the system, any page that the **Timesheet Approved** checkbox can be selected (such as in the Timesheet Confirmation page).



Visit Info Tab: Timesheet Approved – Document Attestation Timestamp

To view *Documentation Attestation* history for the visit, click on the [History](#) link to the far-right of the section. On the View History window, select *Documentation Attestation* from the **Field Name** field, as seen in the following image.



Documentation Attestation: History

# Verification Tab in Visit Info Page

**Tip:** You can press **Ctrl-F** on your keyboard to search this topic.

**DISCLAIMER**

This feature is activated by HHAX System Administration. Please contact [HHAX Support Team](#) for details, setup, and guidance.

To be certified as an EVV alternate vendor, one of the core requirements is for the HHAX system to identify, track, and resolve different exceptions. To further enhance the EVV verification process, a *Verification* tab has been added to the *Visit Details* page for Providers to capture reasons, notes, and attestation and resolve verification issues individually. Information associated with each exception and resolution is then sent at the correct times, via integration, to the EVV aggregator.

## Verification Tab Added to the Visit Window

The *Verification* tab in the Visit window (as seen in the following image) is used to record specific visit verification details (under the *Service Verifications* and *Service Exceptions* sections).

The *Service Verifications* section captures visit confirmation details applicable to the visit, such as:

- Patient Visit Time Confirmation
- Service Discipline Type
- Service Discipline Confirmation
- Patient Signature
- Patient Voice Verification



<b>Non Skilled Visit:</b>		<a href="#">Masterweek update</a>
Admission ID: BOR-900074	Patient Name: Leemie Greg	
Visit Date: 12/28/2020	Patient Phone #: 718-438-1200	
Assignment ID: 100022	Coordinators: Boris G, Nina Duval	
Schedule	Visit Info	Bill Info
<b>Verification</b>		
<b>Service Verifications</b>		<a href="#">History</a>
Patient Visit Time Confirmation:		
Service Discipline Type:	Service Discipline Confirmation:	
Patient Signature:	Patient Voice Verification:	
<b>Service Exceptions</b>		
No Exceptions Identified.		

**Visit Verification Tab**

Any exception to the verification details is captured under the *Service Exceptions* section below the *Service Verifications*, covered in the [Resolve Visit Verification Exceptions](#) section below.

## Verification Information Captured by IVR

When a visit is created, the status in all fields display as **Not Verified** under the *Service Verifications* section. Once IVR is performed, the fields are populated with applicable information, as illustrated in the following image. For IVR, the Patient provides Voice Verification, audio file attached (as denoted by the green paperclip attachment icon).

**HHAExchange - Non Skilled Visit Verification Info**

**Non Skilled Visit:**

Admission ID: HHA-9000205985385559      Patient Name: LUCIANO ROSE  
 Visit Date: 8/27/2020      Patient Phone #: 631-938-1479  
 Assignment ID: 002623      Coordinators: Abel Breath123

Schedule    Visit Info    Bill Info    Care Path    **Verification**

**Service Verifications**      History

Patient Visit Time Confirmation: Confirmed  
 Service Discipline Type: PCA      Service Discipline Confirmation: Confirmed  
 Patient Signature: Not Verified      Patient Voice Verification: Verified

Service Exceptions

IVR: Verification Information

## Verification Information Captured by EVV

As with IVR, the same applies for EVV Verifications. When a visit is created, the status in all fields display as **Not Verified** under the *Service Verifications* section. Once EVV is performed, the fields are populated with applicable information, as illustrated in the following image. For EVV, the **Patient Signature** is captured (rather than Voice Verification) as denoted by the green paperclip (attachment icon).

**HHAExchange - Skilled Visit Verification Info**

**Skilled Visit:**

Admission ID: HHA-9000205985385559      Patient Name: LUCIANO ROSE  
 Visit Date: 5/5/2020      Patient Phone #: 631-938-1479  
 Assignment ID: 002623      Coordinators: Abel Breath123

Visit Info    Bill Info    Care Path    **Verification**

**Service Verifications**      History

Patient Visit Time Confirmation: Confirmed  
 Service Discipline Type: PCA      Service Discipline Confirmation: Confirmed  
 Patient Signature: Verified      Patient Voice Verification: Not Verified

Service Exceptions

EVV Verification Information

To view the Patient signature, hover over the **Patient Signature** [Verified](#) link. The Patient Signature pop-up window displays the captured signature.

**HHAExchange - Skilled Visit Verification Info**

**Skilled Visit:**

Admission ID: HHA-9000205985385559      Patient Name: LUCIANO ROSE  
 Visit Date: 5/5/2020      Patient Phone #: 631-938-1479  
 Assignment ID: 002623      Coordinators: Abel Breath123

Visit Info    Bill Info    **HHAExchange - Patient Signature**

**Service Verifications**      History

Patient Visit Time Confirmation: Confirmed  
 Service Discipline Type: PCA      Service Discipline Confirmation: Confirmed  
 Patient Signature: Verified      Patient Voice Verification: Not Verified

Service Exceptions

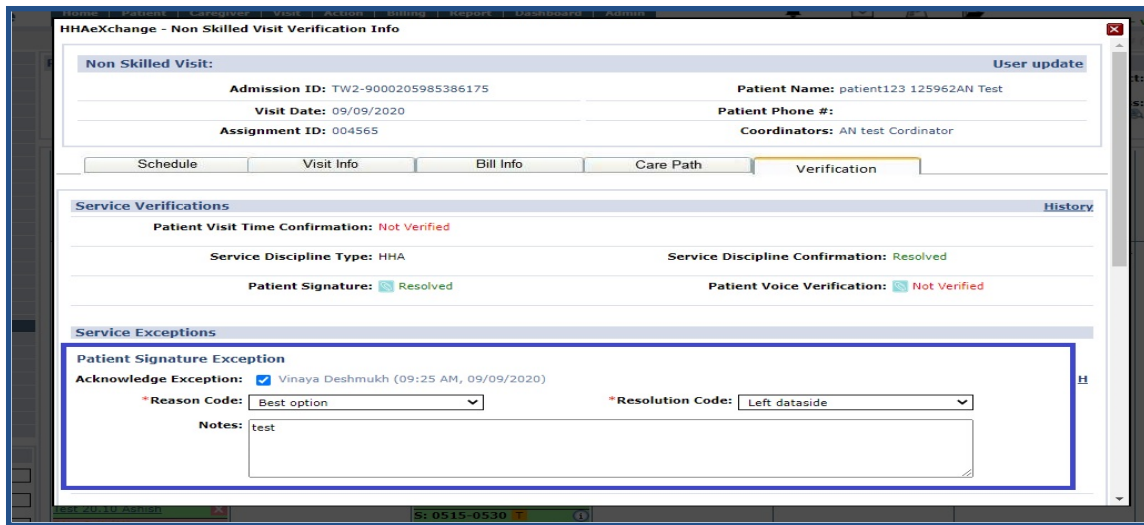
*R. J. Nugale*

Captured Patient Signature

## Resolve Visit Verification Exceptions

The *Verification* tab also includes a **Service Exceptions** section to independently confirm that all required services were provided to the Patient. Service Exceptions appear when further confirmation is required for the verification.

To acknowledge an exception, select the **Acknowledge Exception** checkbox. This captures the user who acknowledged the exception as well as the date and time. Select the **Reason Code** and the **Resolution Code** from the dropdown fields; values are derived from the associated Reference Table. Refer to the [Alternate EVV Reference Tables](#) section for further guidance.

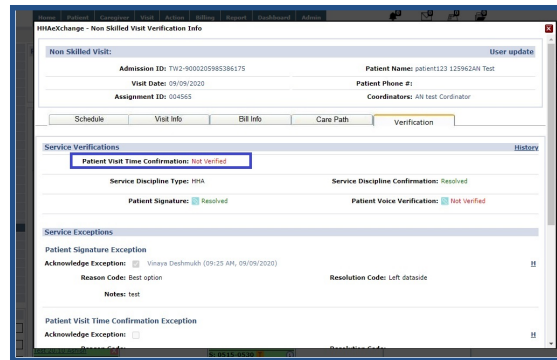


Verification Tab: Service Exceptions Section

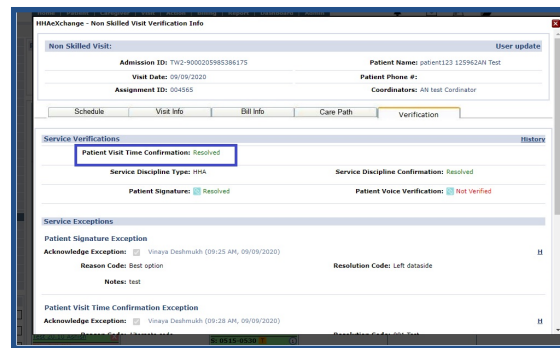
The *Service Exceptions* section includes the particular exception (the image above illustrates **Patient Signature Exception**) with the following fields and information to complete (per exception), as needed:

Field	Description
<b>Acknowledge Exception</b>	Select checkbox to record the user, date, and time.
<b>*Reason Code</b>	(Required) Select the Reason Code (values from the Reference Table).
<b>*Resolution Code</b>	(Required) Select the Resolution code (values from the Reference Table).
<b>Notes</b>	(Optional) Enter notes if/as needed.

Complete details for all exceptions as there may be more than one. Once complete, click the **Save** button to finalize. When all required resolution information for an exception is entered, the status changes from **Not Verified** (in red font) to **Resolved** (in green font), as seen in the following images.



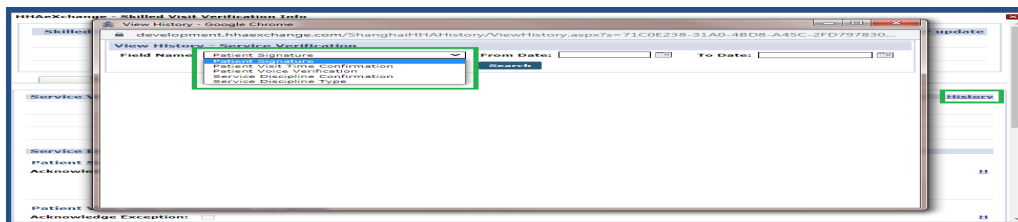
**Not Verified**



**Resolved**

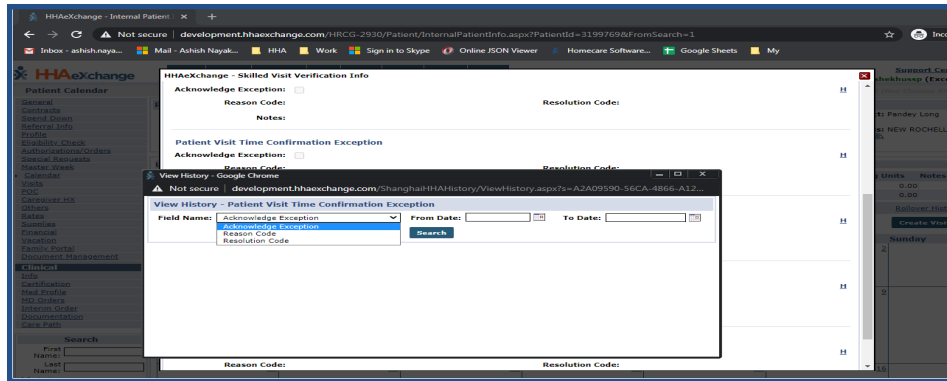
## Visit Verification and Exception History

To view the verification history log for a visit, click on the [History](#) link in the *Service Verifications* section. Select a **Field Name** to see specific information.



**Service Verification History**

To view the history on specific Verification Exceptions fields, click on the respective [H](#) link. Based on the selection select the category from the **Field Name** field, as seen in the following image.

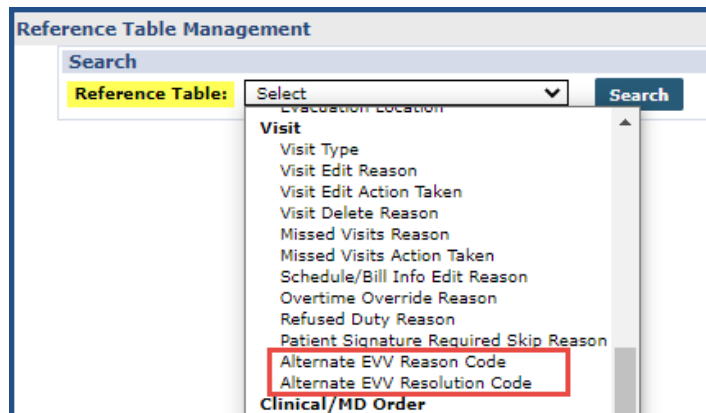


Visit Verification Expection History

## Alternate EVV Reference Tables

Values for the **Reason Code** and **Resolution Code** fields in the *Verification* tab are managed by the Agency via the newly added Reference Tables under the Visit category:

- **Alternate EVV Reason Code** and
- **Alternate EVV Resolution Code**

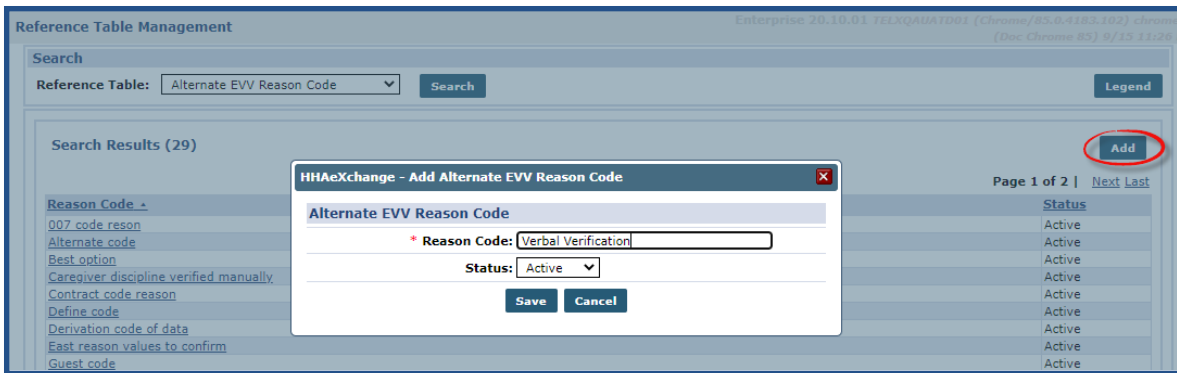


Alaternate EVV Reference Tables

## Adding Values to the Alternate EVV Reference Tables

To add a value in either Reference Table, navigate to **Admin > Reference Table Management** and select the applicable Reference Table. Click the **Add** button (at the far right) to open the *Add/Edit* window. The example below illustrates adding an **Alternate EVV Reason Code**. The same applies for the **Alternate EVV Resolution Code** Table.

Enter a **Reason Code** (Title), required, as denoted by the red asterisk. Ensure the **Status** is *Active*. Click **Save** to add.



Adding an Alternate EVV Reason Code

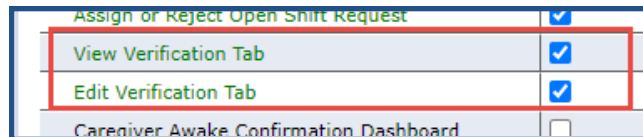
To edit a **Reason Code**, click on the existing [Reason Code](#) (link) and make edits in the window. The same applies to the **Resolution Code** values in the *Alternate EVV Resolution Code Table*.

**Note:** Values cannot be deleted. To deactivate a value, select the existing [Reason Code](#) (link) from the Reference Table and select *Inactive* from the **Status** dropdown field.

## Verification Tab Permissions

To assign permissions to a role, navigate to **Admin > User Management > Edit Roles**.

Select *Visit* under the **Section** field and select applicable roles from the **Roles** dropdown.



Verification Tab Permissions

Select the **View Verification Tab** checkbox to enable viewing information on the Verification tab. Select the **Edit Verification Tab** checkbox to enable editing on the Verification tab.

Click **Save** to finalize.

**Note:** The *View Verification Tab* permission must be selected to enable the *Edit Verification Tab* permission.



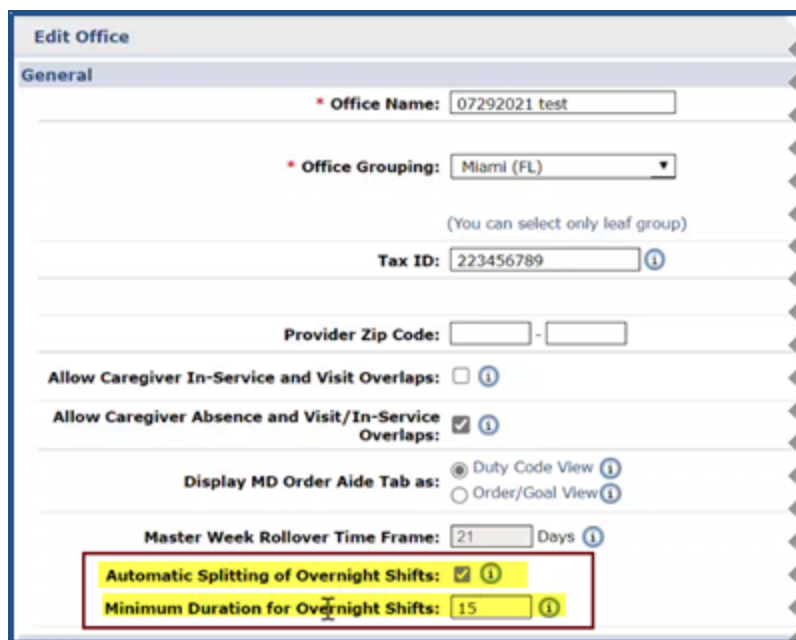
# Automatic Splitting of Overnight Shifts

The EVV system supports overnight shifts that do not require Caregivers to Clock In and Clock Out multiple times per shift. The EVV system splits the overnight shift into two separate EVV visit transactions for the two affected days. The EVV system only requires a visit to be scheduled on the date the overnight shift begins.

## Enabling at the Office Level

To enable and configure this feature, select the **Automatic Splitting of Overnight Shifts** field in the *Edit Office* page (**Admin > Office Setup**), in the *General* section.

Thereafter, enter a numeric value in the **Minimum Duration for Overnight Shifts** field to define the minimum amount of time required for the automated splitting of overnight shifts to occur. The value entered must be in 15-minute increments (15, 30, 45, 60.); 15 minutes at a minimum.



The screenshot shows the 'Edit Office' page with the 'General' section expanded. The following fields are visible:

- Office Name: 07292021 test
- Office Grouping: Miami (FL)
- Tax ID: 223456789
- Provider Zip Code: [ ] - [ ]
- Allow Caregiver In-Service and Visit Overlaps:
- Allow Caregiver Absence and Visit/In-Service Overlaps:
- Display MD Order Aide Tab as:  Duty Code View,  Order/Goal View
- Master Week Rollover Time Frame: 21 Days
- Automatic Splitting of Overnight Shifts:**
- Minimum Duration for Overnight Shifts: 15**

Edit Office: Automatic Splitting of Overnight Shifts and Minimum Duration Checkboxes

Once saved, the system automatically splits visits that occur overnight, and Caregivers only need to submit a single Clock In and Clock Out for an overnight shift. In addition, the POC is applied to both visits. For example, if 60 (minutes) is entered as the minimum duration, then visits ending after 1:00 am are split. Any visit ending prior to that time does not split.

If the visit does not meet the minimum duration period, then the second portion of the visit must be entered manually.