Services Portal
User Guide

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Overview

This Services Portal Users documentation explain how to use the Services Portal to meet Electronic Visit Verification (EVV) requirements. The Services Portal is a website where Consumers (CDS Employers), Caregivers (CDS Employees), and their Representatives can review, adjust, and approve all EVV visits. This Services Portal Users documentation explain how to use the Services Portal to meet Electronic Visit Verification (EVV) requirements. The Services Portal is a website where Consumers (CDS Employers) and their Representatives can review, adjust, and approve all EVV visits.

What Is EVV?

The 21st Century Cures Act, passed by Congress, requires state Medicaid programs to use EVV (Electronic Visit Verification) for many types of home and community-based services.

EVV refers to the electronic capture of visit information using one of the three approved methods: mobile app, telephone, or alternative device.

Caregivers use one of the three methods to electronically record required EVV information for each shift (or visit) they work. EVV records the start and end time of each shift, the location where the Caregiver is working, and the type of service they are providing.

HHAX System Key Terms and Definitions

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

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

Get Started

The Provider Agency (Financial Management Services Agency - FMSA) begins the setup of each Services Portal user. *Consumers* (Employers), *Caregivers (*Employees*)* , and *Representatives* all use the Services Portal.
The Provider Agency (Financial Management Services Agency - FMSA) begins the setup of each Services Portal user. *Consumers* (Employers) and *Representatives* both use the Services Portal.

A valid email address is required to create your account. Make sure that your Provider Agency has your correct email address.
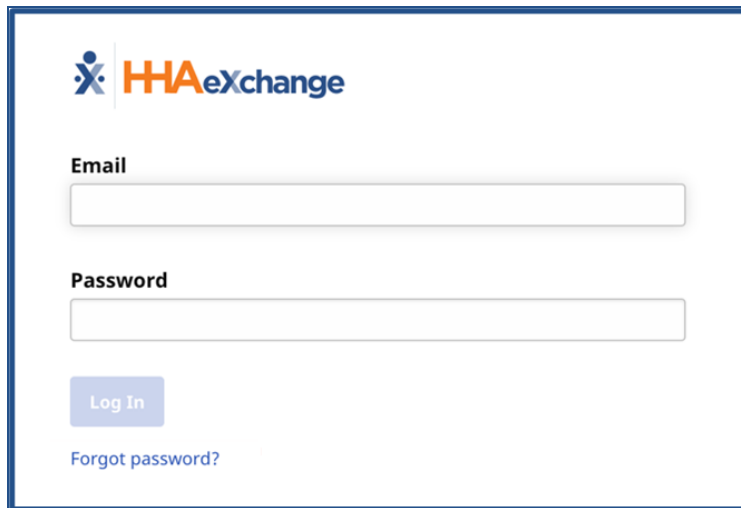
Email Verification and Password

After your user account is created by the Provider Agency, you receive an email welcoming you to the *HHAeXchange Services Portal* and asking you to confirm your email address. Follow the instructions in the email.

After you have verified your email address,

- If you use the *HHAeXchange+ mobile app* as well as the Services Portal, and you have already signed up for HHAeXchange+, you can log into the Services Portal using the same email address and password you use for HHAeXchange +.
- If you don't use the *HHAeXchange+ mobile app*, or if you haven't yet signed up for HHAeXchange+, you receive a second email asking you to Set your Password and verify your identity. Follow the instructions in the email. When you finish, you can log in to the Services Portal.

Log In

To log in to the Services Portal, on the *Login* page, type your **Email** address and **Password** and click ***Log In***.

Login page

Login Language Selection

On the lower left of the *Login* page, there is an option to change the Login page language.

Click one of the displayed alternate languages to change the Login page to that language, or click the language icon to select another available language.

Language Selection Icon

Services Portal Components

When you log in, the Services Portal opens to the *Shifts* page. The *Shifts* page has three sections, numbered in this image, and explained in the table following the image. Each section is covered in detail elsewhere in this documentation.
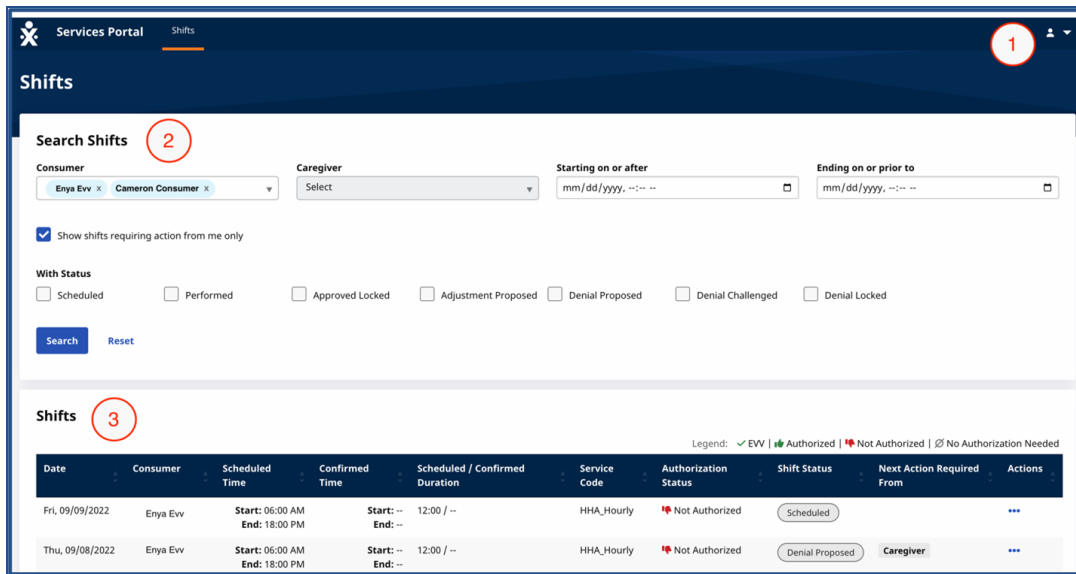

The Shifts Page

| Section	Description
1 - System Menu	Used to view and change system settings, change your password, and log out of the system.
2 - Search Shifts	Use filters and fields to search for shifts.
3 - Shifts	Listing of your shifts. Each line has details about shifts, such as Status and Service Code. Click the ellipsis (...) in the **Actions** column to see available actions for your shifts.

System Menu

The **System Menu** is at the top-right corner of the *Shifts* page. Click the person icon [icon] to view the menu options: **System Settings**, **Change Password**, and **Logout**.
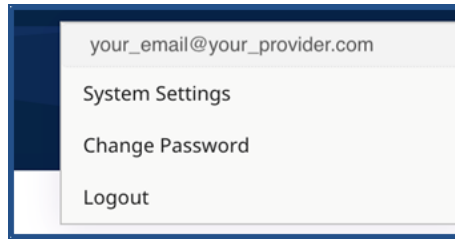
System Menu

System Settings

From the **System Menu**, click **System Settings** to view and change Services Portal settings. You can select your preferred Language, Time Zone, "Patient" Keyword Preference, "Caregiver" Keyword Preference, and Notification Preferences for Email from the Services Portal.
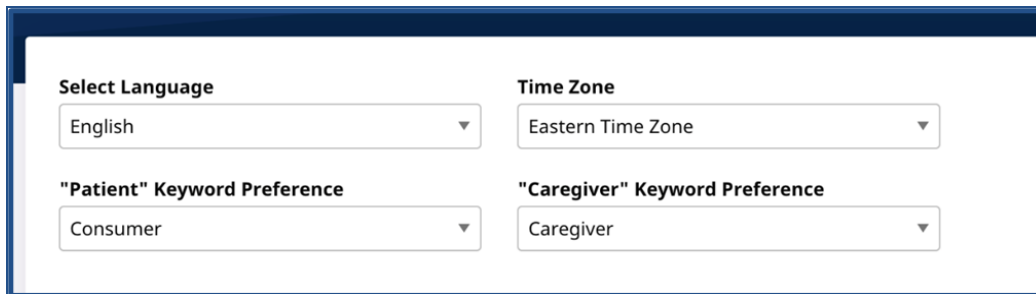
System Settings page
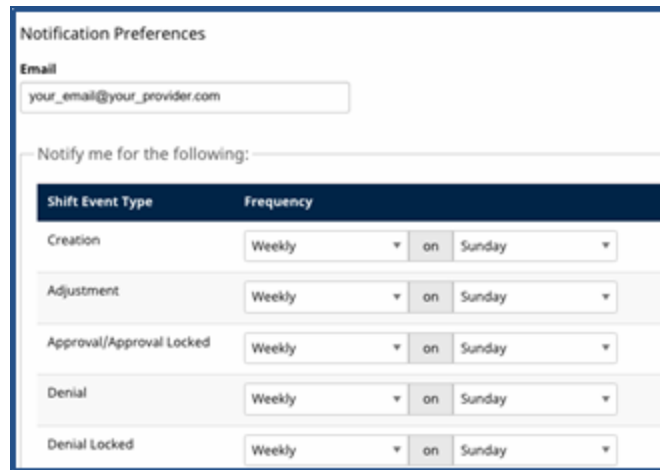
In **Select Language**, select your preferred language from the list. When you save System Settings, the selected language is used throughout the Services Portal. In some cases (such as the names of Service Codes), the language of words cannot be changed from English.

In **Time Zone**, select the time zone where you work.

"Patient" Keyword Preference lets you select the term the system uses for the person who receives Home and Community-Based Services.

"Caregiver" Keyword Preference lets you select the term the system uses for the person who provides Home and Community-Based Services.
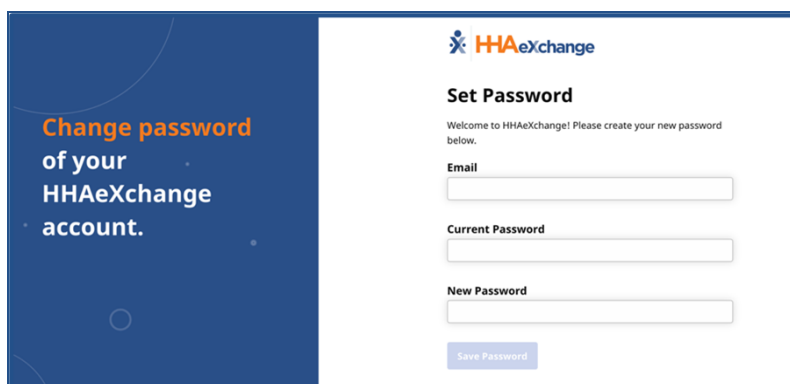
Notification Preferences

In the **Notification Preferences** section, you can select how often (**Frequency**) to receive system emails at the listed address (**Email**). These emails alert you to any actions taken on shifts. You can be notified on a different frequency for each **Shift Event Type**.

- Selecting the *Real-Time* frequency may mean receiving multiple emails in one day as events occur.
- Selecting *Off* for the frequency means the system does not issue any notifications for that Shift Event Type. If you use *Off*, be sure to check the Services Portal regularly to act on your shifts.

To change any setting in *System Settings*, make selections and click **Save** at the bottom of the page.

Change Password

From the **System Menu**, click **Change Password** to open the *Change Password* page. You must know your **Email** address and **Current Password** to change your password. If you have forgotten your Current Password, you can [Reset Your Password](#).
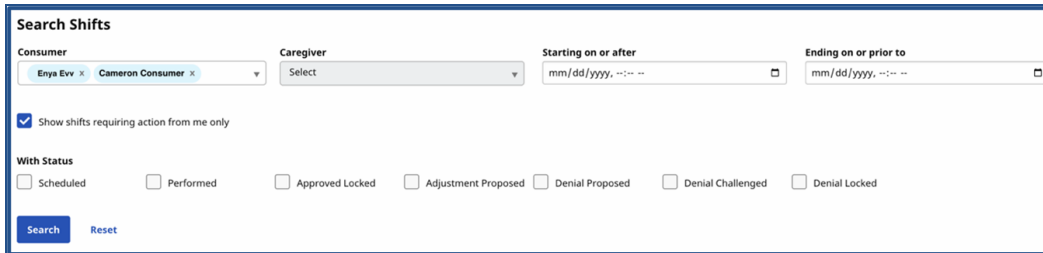
Change Password Screen

Log Out

From the **System Menu**, click **Logout** to log out of the Services Portal and return to the *Log in* page.

Search Shifts

Note: When Search Shift instructions differ for *Consumers*, *Caregivers*, or *Representatives*, the difference is explained at the start of the instruction.
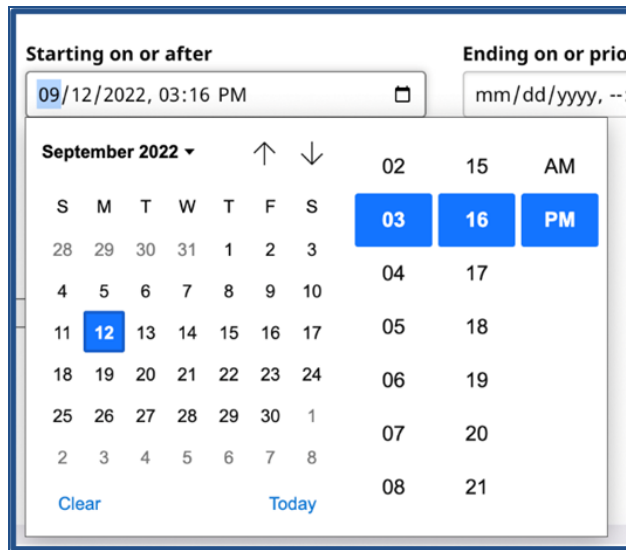

Search Shifts Options

The *Search Shifts* options allows you to search for a specific shift or to sort through a list of shifts assigned to your by selecting one or more filter options. Available filters depend on your role in the system.

Consumers (CDS Employers) cannot select from the **Consumer** list because Consumers can only see their own shifts. *Consumers* can select from the **Caregiver** list. The system preselects all *Caregivers* who work for the *Consumer*. All other fields are available to search and sort.

Caregivers (CDS Employees) can select from the **Consumer** list. The system preselects all *Consumers* with whom the *Caregiver* works. *Caregivers* cannot select from the **Caregiver** list, as they can only see their own shifts. All other fields are available to search and sort.

Representatives may or may not be able to select from the **Consumer** or **Caregiver** lists. Selecting anything from these lists depends on how many Consumers with whom the Representative is connected and how many Caregivers are connected to those Consumers. All other fields are available to search and sort.
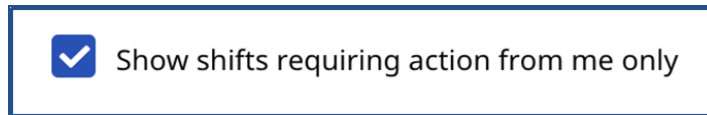
When you click the **Starting on or after** or **Ending on or prior to** fields, a menu is displayed with the date on the left and the time on the right. Use one or both fields to filter the shifts to a date range. At the bottom of the calendar, click *Clear* to remove the currently selected date from the field. Click *Today* to set the selection to the current date and time.
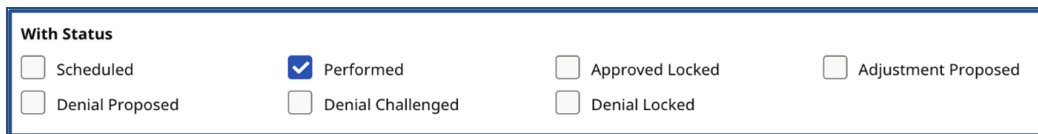
Date Filter Options

On the *Search Shifts* page, select the **Show shifts requiring action from me only** checkbox (under the search filters) to view only the shifts that need an action (approval, review, or denial) from you.

Show Shifts Requiring Action

The **With Status** checkboxes allow the user to filter the list of shifts to those with one or more statuses. By default, all shifts of all statuses are displayed. Check one or more Status types to limit the shift display to only those statuses. More details and instructions on Status in are provided in Approve a Shift, Adjust a Shift, and Deny a Shift.

With Status Checkboxes

Shift Status

Shift Status values are defined in the following table.

Status	Description
Scheduled	Shift planned to happen in the future but has not been recorded using EVV.
Performed	Shift recorded using EVV and waiting for approval from the Consumer.
Approved Locked	Consumer (or Representative where authorized) approved the shift. Because the shift is locked, it can no longer be changed by the Consumer, Caregiver, or Representative.
Adjustment Proposed	One party (either the Consumer, Caregiver, or Representative) has made a change to some part of the shift. The shift now must be reviewed and approved by the other party. • If Consumer or Representative made the change, Caregiver must review. • If Caregiver made the change, Consumer or Representative must review.
Denial Proposed	One party (either the Consumer, Caregiver, or Representative) has asked that the shift be denied. The shift must be reviewed, and the denial accepted by the other party. • If Consumer or Representative made the denial, Caregiver must review. • If Caregiver made the denial, Consumer or Representative must review.
Denial Locked	Shift denied by one party, and the other party agreed to the denial. Because the shift is locked, it can no longer be changed by the Consumer, Caregiver, or Representative.

Click **Search** at the bottom of the form to apply the filters or click **Reset** to clear any selected filters. Click **Search** to restore the full list.

Search and Reset

Shift Index

On the *Shifts* page, if no filters are applied to shifts, all shifts are displayed in search results. By default, shifts are sorted from newest to oldest. Each line contains shift data. To act on any shift, click on the ellipsis (…) in the **Actions** column (on the far-right of the line).


Shift Index (List)

Column	Description
Date	Date of the shift.
Consumer	Name of the Consumer (CDS Employer) who received services.
Scheduled Time	Time the shift was scheduled to happen.
Confirmed Time	Actual time of the shift as recorded with clock-in and clock-out. If the shift was recorded with EVV, a green EVV checkmark appears near the confirmed time.
Scheduled/Confirmed Duration	Total shift time scheduled (in hours and minutes) and total shift time confirmed by the EVV clock-in and clock-out.
Service Code	System name for the service performed during the shift.
Authorization Status	Displays whether or not the Provider Agency entered an authorization.
Shift Status	Status of the shift. Details described in Search Shifts.
Next Action Required From	Name of the person who must perform an action on the shift.
Actions	Click the ellipsis (…) to open a menu of actions to take on the shift.

Action Menu

Click the ellipsis (…) in the **Actions** column (on the far-right of the list in the *Shifts* page) to open a menu of actions to take on a particular shift. The actions available on a shift depend on the status of the shift. Each action is described in Approve a Shift, Adjust a Shift, and Deny a Shift.
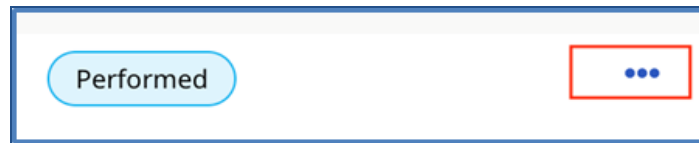
**Click ellipsis to access Action Menu**

Approve a Shift

When a Caregiver records a shift with EVV, that shift is automatically approved by the Caregiver. It is then the responsibility of the Consumer or Representative to review the shift in the Services Portal and place it in **Approved Locked** status.

As a Consumer or Representative, complete the following steps to approve a shift.

1. Log in to the Services Portal.
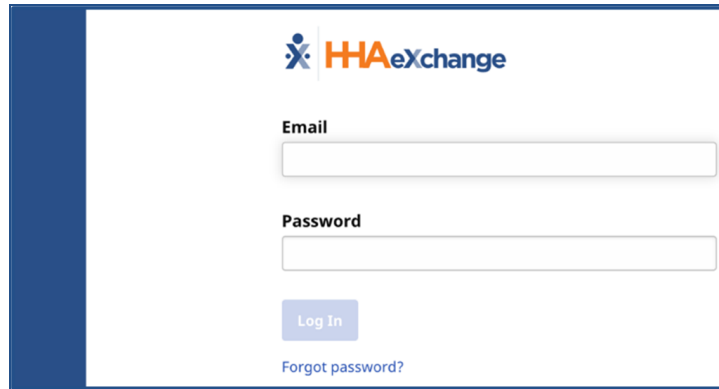
Log In page

2. On the *Shifts* page, select the **Show shifts requiring action from me only** checkbox. Click **Search** at the bottom of the form.
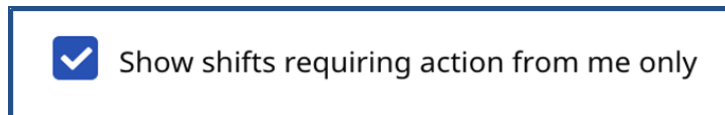
Show Shifts Requiring Action
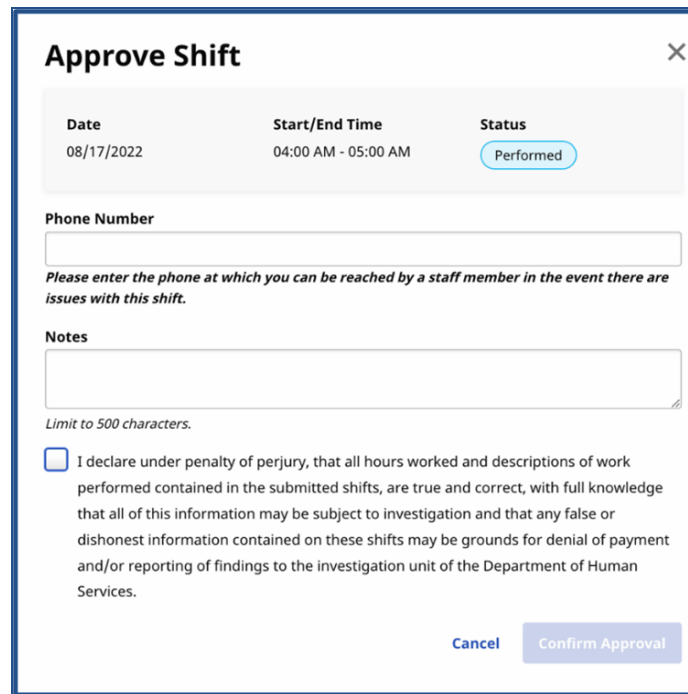
3. When search results are displayed, review the shift data. If the shift is correct, click the ellipsis (…) in the **Actions** column. Select **Lock as Approved**.
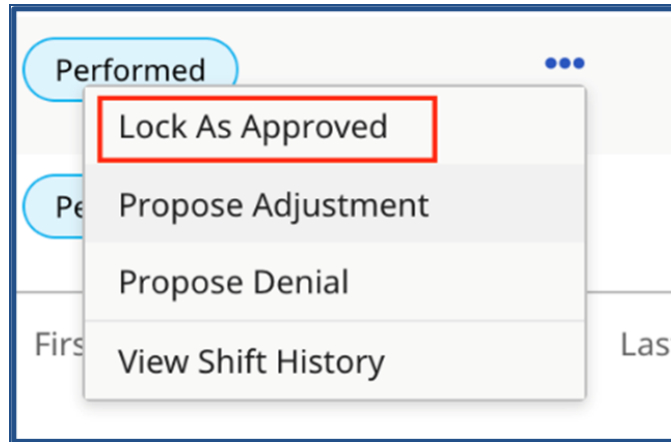
Select Lock As Approved

4. When the *Approve Shift* page is displayed, click the checkbox to the left of the confirmation statement to confirm the shift.

Approve Shift Page

5. Click ***Confirm Approval*** to approve.

Confirm Approval

The shift is placed in **Approved Locked** status.
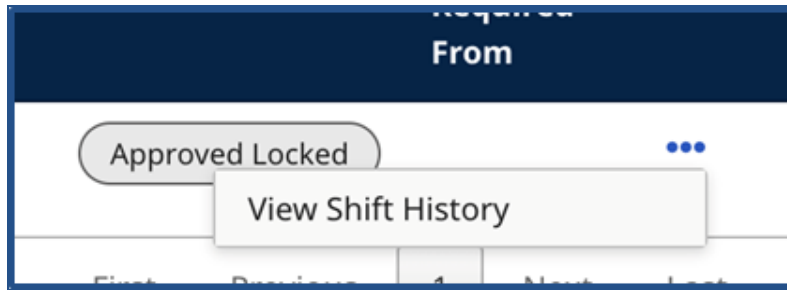
Approved Locked Shift

In **Approved Locked** status, a shift cannot be edited, and the status of the shift cannot be changed by the Consumer, Representative, or Caregiver. The only available option in the Action Menu is to View Shift History. If any changes are needed, the Consumer, Representative, or Caregiver must contact the Provider Agency.

Adjust Shift

A shift may need to be adjusted. For example, a Caregiver arrives at the shift but cannot clock-in because of a dead phone battery or a Caregiver forgets to clock-in at the start of the shift but remembers and clocks in late before the end of the shift.
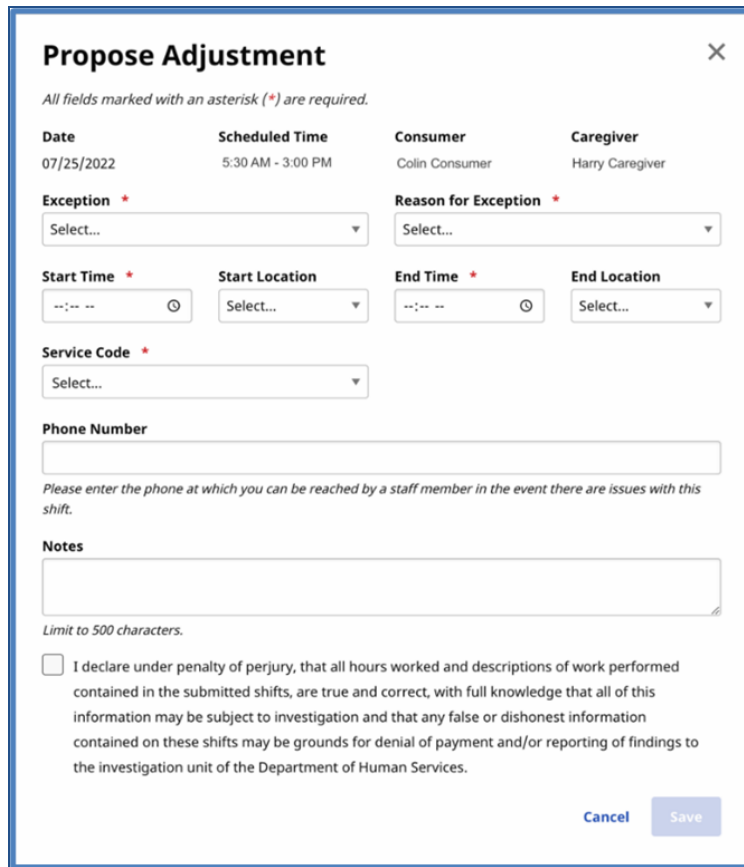
Complete the following steps to adjust a shift.

1. In the Services Portal, search for the shift to be adjusted. Refer to <u>Search Shifts</u> for details on searching for shifts.

2. On the shift, click on the ellipsis (…) in the **Actions** column and select ***Propose Adjustment***.
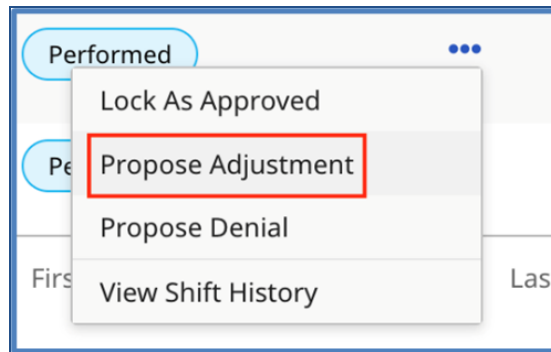
Actions: Select Propose Adjustment

3. When the *Propose Adjustment* page is displayed, complete the required fields (marked with a red asterisk *).

Propose Adjustment page

4. Select an **Exception** (why an adjustment is made) and a **Reason for Exception** (what led to the exception) that best matches the situation.

Exception and Reason Code Lists

5. Adjust other fields (such as **Start Time**, **End Time**, **Start Location**, **End Location**, **Service Code**) as needed.

Required Fields

6. In **Notes**, type a comment to describe the change. This comment is seen by other parties when approving the changes. Finally, select the confirmation statement checkbox and click ***Save***.

Confirm the Adjustment

The other party is notified of the shift adjustment.

If the *Caregiver* made the changes, the *Consumer* or *Representative* must review and approve the adjustment.
If the *Consumer* or *Representative* made the changes, the *Caregiver* must approve the adjustment.

Refer to Approve a Shift to finish the approval process.

Deny Shift

You may need to deny a shift if the visit was recorded in error. For example, if a Caregiver accidentally begins an EVV visit for the incorrect Consumer but completes it rather than canceling it. Shifts are first denied by one party, then *Locked as Denied* by the other. If a visit is partially correct, the shift can be Adjusted rather than denied.
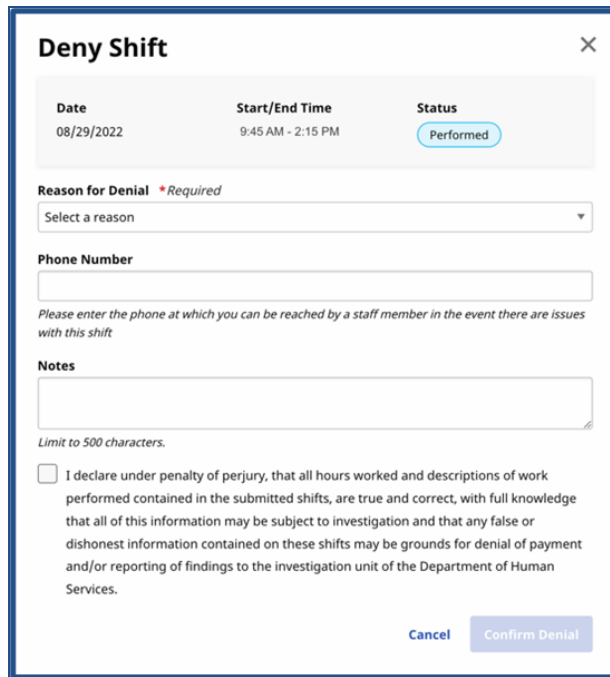
Complete the following steps to deny a shift.

1. Log in to the Services Portal and search for the shift. See Search Shifts for details.
2. For the shift you want to deny, click the ellipsis (…) in the **Actions** column, and select ***Propose Denial***.
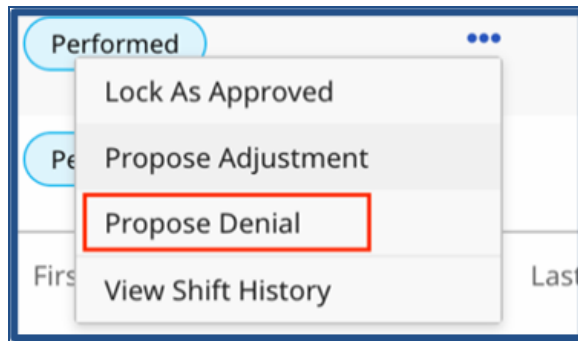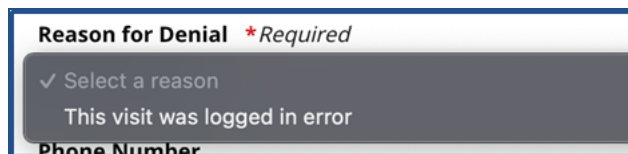

Actions: Propose Denial

3. When the *Deny Shifts* page is displayed, complete the required fields (denoted with a red asterisk).
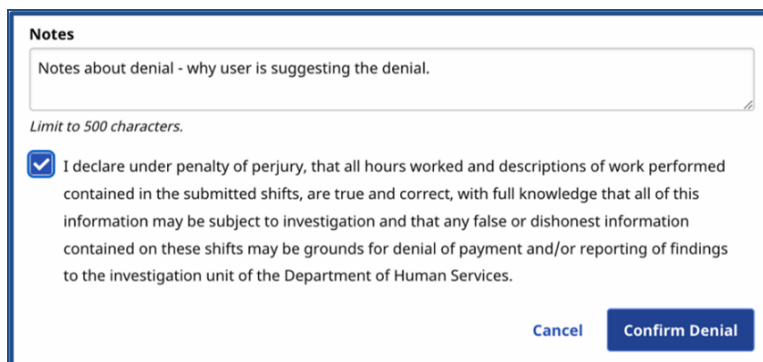
Deny Shifts page

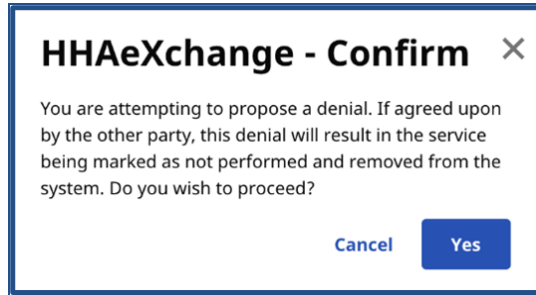4. Select a reason for the denial from the **Reason for Denial** list.

Reason for Denial Field

5. In **Notes**, type a comment (seen by all users) to describe the denial. Select the confirmation statement checkbox and click the ***Confirm Denial***.

Confirm Denial

6. When the Confirm prompt is displayed, click **Yes** to confirm and place the shift in a *Denial Proposed* status.
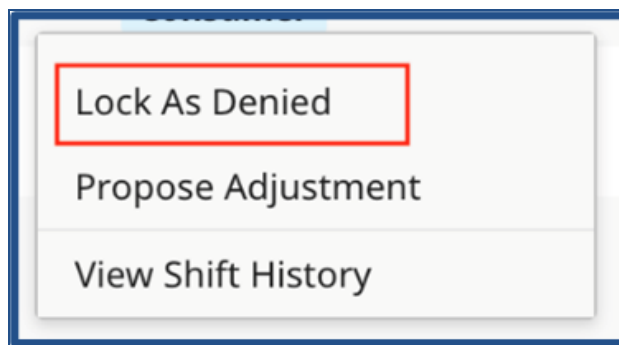

Confirm page

Further review is required in the Services Portal, depending on who submitted the denial. The Consumer or Representative must review if the Caregiver proposed the denial. The Caregiver must review if the Consumer or Representative proposed the denial.

Depending on the situation, a user can:

- Lock as Denied, if a user agrees with a denial and the shift should not be approved.
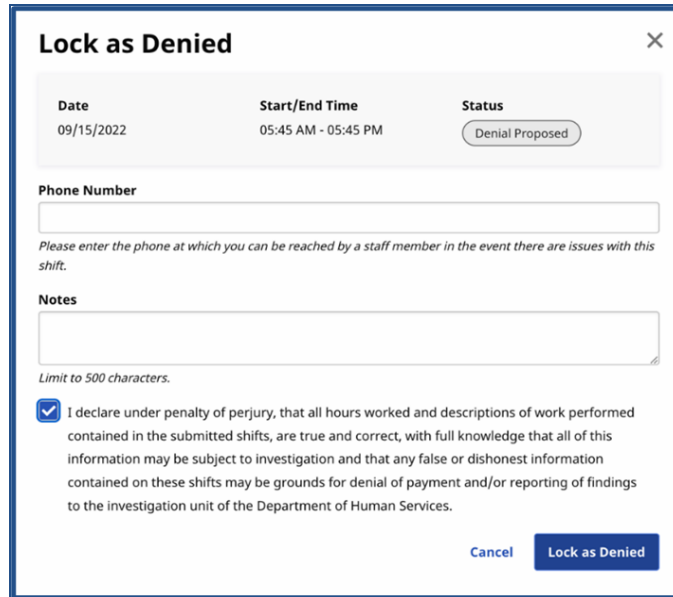- Propose Adjustment to change the shift and then seek approval.

Lock Shift As Denied

1. Locate the shift with the Proposed Denial status in the search results. Click the ellipsis (…) in the **Actions** column and select **Lock as Denied**.
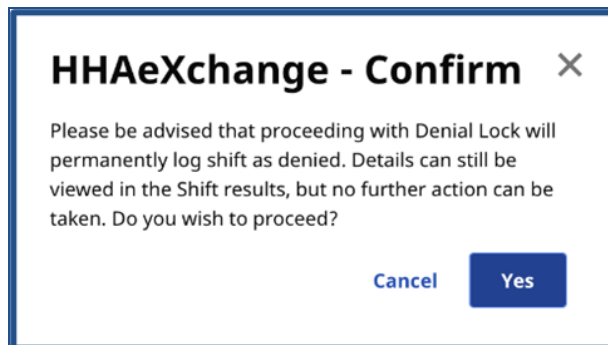

Actions: Lock as Denied

2. When the *Lock as Denied* page is displayed, add Notes to explain why the shift should be denied. Select the confirmation statement checkbox and click **Lock as Denied**.

Lock As Denied page

3. When a Confirm prompt is displayed, click **Yes** to confirm and place the shift in a *Denial Locked* status.
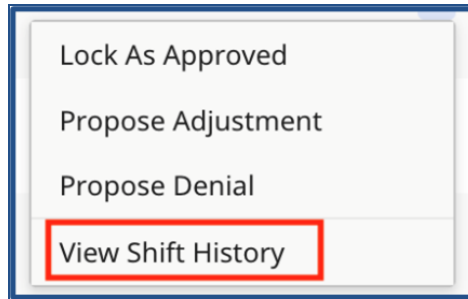

Confirm Denial

In the *Denial Locked* state, the shift cannot be edited, and the status cannot be changed by the Consumer, the Representative, or the Caregiver.
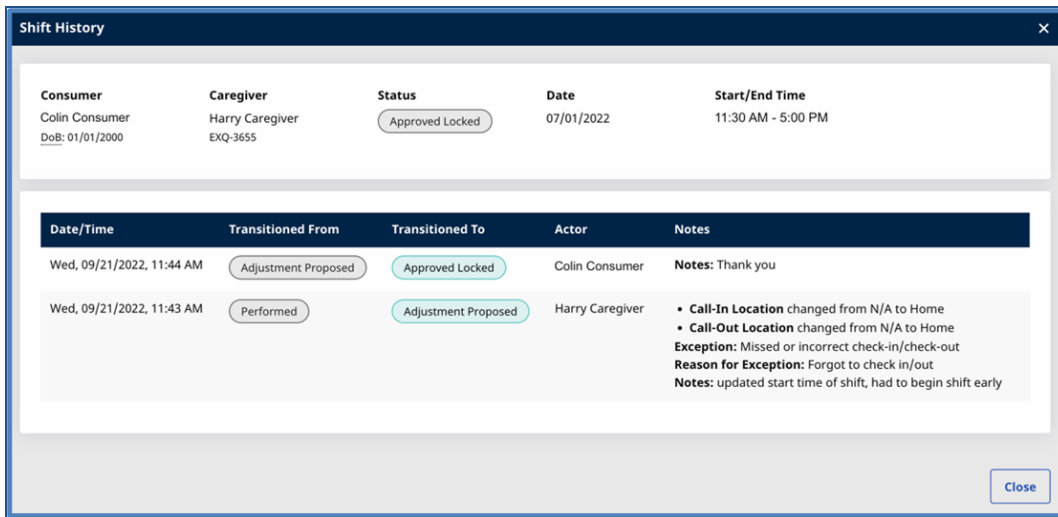
View Shift History

To view the history of a shift, click ellipsis (…) in the **Actions** column for the shift, and select ***View Shift History***.

Actions: View Shift History

The *Shift History* page displays information including shift details, status changes, and notes. When you are finished reviewing history, click ***Close***.
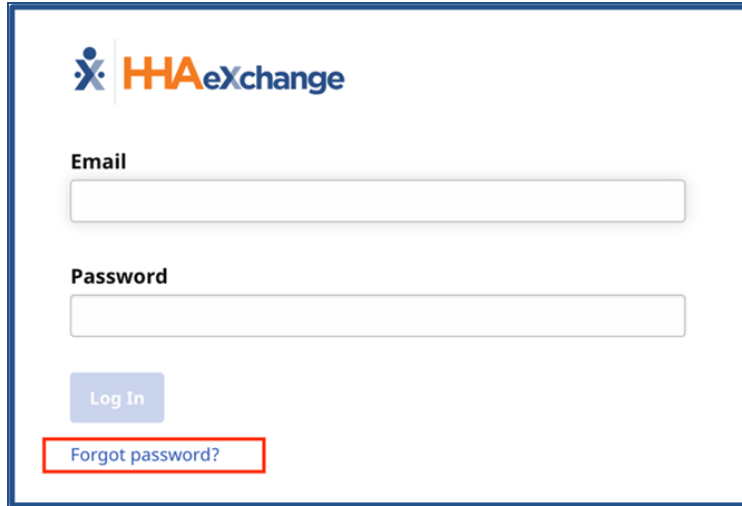

Shift History page

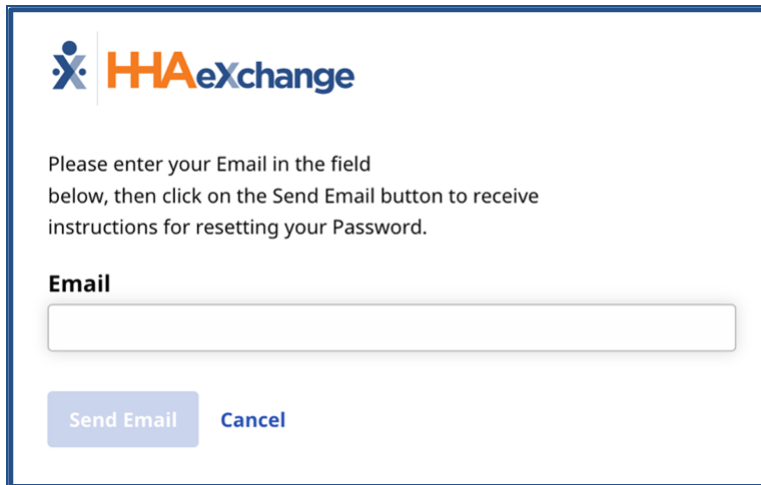| Field	Description
Consumer	Name of the Consumer who received services.
Caregiver	Name of the Caregiver who provided services.
Status	Status of the shift. See Shift Status in Search Shifts for details.
Start/End Time	Start and end time of the shift.
Date/Time	Date and time that the action occurred.
Transitioned From	Status of the shift before the action occurred.
Transitioned To	Status of the shift after the action occurred.
Actor	Person who performed the action.
Notes	Information about the shift, including changes, reasons for changes, and notes left by the person who made the changes or performed the action.

Reset Password

To reset your password, from the *Log In* page, click ***Forgot Password***.

Forgot Password Link

Enter your **Email** address then click ***Send Email***. The system sends you an email with a temporary password you can use to log in and create a new password.

Reset Password Form