

# EVV Management Process Guide

Managing Electronic Visit Verification

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# **Document Revision History**

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Date	Description of Revision
06/03/2016	Initial version of the document
10/24/2016	Update: EVV Based Visit Scheduling and Confirmation
11/16/2016	Update: <u>Disable Visit creation based on EVV for Patients</u>
	Update: <u>Service-Specific EVV Confirmation</u>
02/02/2017	Update: <u>Edit GPS Coordinates</u>
02/16/2017	Update: <u>Automatic Visit Creation for Contracts</u>
03/20/2018	General documentation updates
10/15/2018	Added Patient Multi-Address information to Patient Setup
03/21/2019	Added: EVV Patient with Multiple Addresses to Call Dashboard
05/07/2019	Added: Note reference to the Confirm Timesheet (Beta) page
03/03/2020	Added: Tracking Location Where EVV is Performed
10/26/2020	Added: <u>Patient Voice Verification on IVR Clock Out</u>
	Added: Documenting an Alternate EVV Workflow Verification
12/28/2020	Added: <u>Verification Tab in Visit Info Page</u>
03/15/2021	Accessibility standards applied
05/27/2021	EVV Attestation Update
	EVV Required Update (field automatically enabled)
	Patient Phone Number/Address defaults to Primary
	Address Type value defaults to Home
09/15/2022	General updates applied
09/19/2022	Add Service Location Edits (Cures Act Requirements)



Add Perr	nissions for Linking EVV
Update E 01/23/2023 Link to A	VV Linking Permissions content utomatic Creation of Schedules Job Aid (replace old content)



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# **Overview**

#### DISCLAIMER

The EVV feature is activated by HHAX System Administration. Please contact <u>HHAX Support Team</u> for details, setup, and guidance.

**Electronic Visit Verification (EVV)** is a type of visit confirmation which allows 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 Client Support.

#### **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.
ННАХ	Acronym for HHAeXchange

#### **EVV Specific Terms**

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

Term	Definition	
Caller ID	Refers to IVR/Telephony	
Call	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**

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



#### **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)
	Caregivers to place EVVs using the Mobile App. The Tolerance Range (ft)
	refers to the acceptable distance range a Caregiver can make a valid EVV
	from.
Mobile GPS Visit	If the Televence Bange is get to 100 feet, the Caregiver can successfully place
Verification	If the Tolerance Range is set to 100 feet, the Caregiver can successfully place
/Tolerance Range (ft)	an EVV via GPS within 100 feet of the Patient's address based on the
	address's coordinates.
	* Mobile GPS Visit Verification: 🗹 Tolerance Range (ft): 100 🕕
	Mobile GPS Visit Verification/Tolerance Range
	Caregivers to enter FOB codes using the Mobile App.
Mobile Fixed Visit	
Verification	Mobile Fixed Visit Verification:
	Mobile Fixed Visit Verification
	To set a window for Caregivers to place a linkable EVV. For example, if the
	Unbalanced Tolerance 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
Unbalanced Tolerance	visit
	UnBalanced Tolerance: Hours 0 Min 15 3
	Unbalanced Tolerance

#### **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.
	The EVV settings are in the General section as illustrated in the image below and described
	underneath.
	General
	Nurse: Select 🔍
	Caregivers with Access to Patient Info via Mobile App: Select 💙 🛈 🛈
	Enable FOB Confirmation:   Change will take effect on the following day  Enable FOB Confirmation:   (FOB Device ID)
	FOB Seal ID: 12345678
2	Service Type:
2	
	• The EVV Required checkbox is automatically selected when a <i>Referral</i> converted to a <i>Patient</i> .
	• Select the <b>Enable FOB Confirmation</b> checkbox if the Patient uses an FOB device. Enter the
	required FOB Device ID and FOB Seal ID fields (if this option is selected). The Caregiver must
	enter the Device ID each time an EVV is entered.
	• The Caregiver with Access to Patient Info via Mobile App 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.
3	Select the Patient's <i>Profile</i> page (from the left nav) and go to the <i>Address</i> section.
	Complete the Patient's demographic information. Multiple Addresses can be entered for a
	Patient as a GPS-enabled Address Type (as seen in the image). Verify that all addresses are
_	accurate, as the system uses these values to validate EVV confirmations.
4	
	Address         Address line 2         City         State         County         Zip         Cross Street         Primary         Address Type(s)         Notes           1234 Coral Way         Coral Gobles         FL         Mani-dade         3345         Yes         Q         Image: Head Street         H
	Patient Profile GPS Enabled Patient Addresses
	For other forms of EVV, the Patient Phone Number(s) is used to confirm an EVV. Verify the Phone
	Number Information on the Dationt Profile
5	Number mormation on the Fatient Frome.
	Phone Number Information
	Home Phone: 305-222-1123
	Phone 2: 305-333-444
	Patient Profile – Patient Phone Number Information
	Refer to the Tracking Location Where EVV is Performed section for full details on linking a Patient
	Phone Number to an EVV method.



# **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.



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.



# **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
	Time and Attendance phone number.
2	Enters "1" to Clock In.
3	The system then prompts the Caregiver to enter their Time and Attendance Pin (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 Time
	and Attendance 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.
	The system prompts the Caregiver to enter the duties performed for the Visit. The system
8	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.
٩	After entering all duties, the Caregiver enters "000". The system confirms the entry and ends the
9	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 <u>FOB Process Guide</u> 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	
2	indicate "FOB Device" confirmation.	
3	The Caregiver presses "3" a second time to indicate "FOB Clock In and Clock Out."	
	As prompted, the Caregiver then enters the following:	
	1. Enter Time & Attendance Pin.	
	2. Enter the 6-Digit <b>Device ID</b> .	
4	3. Enter the 8-Digit Clock In <b>passcode</b> .	
	4. Enter the 8-Digit Clock Out <b>passcode</b> .	
	5. Enter 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 <u>Mobile App Process</u> <u>Guide</u> 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 <u>Caregiver Setup</u> section above).

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 Today's Schedule from the main menu and then select the Patient.
3	Select Clock In.
	Select the visit verification method: GPS or Security Token (FOB)
	• When the <b>GPS</b> function is used to place EVV, the system validates the coordinates of the EVVs
4	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.
	• For <b>FOB</b> , the Caregiver is prompted to enter the <b>Device ID</b> and the 8-digit passcode.
5	At the end of the visit, repeat Step 1, Step 2, Step 3, and Step 4, with the addendum that Clock
5	Out is selected on Step 3.
6	Lastly, enter the POC duties performed and select <i>Save</i> to finalize.

Refer to the <u>Mobile App Process Guide</u> 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 following image).

Thursday	Friday		Sa	Saturday				
S:1000-1200	3 5:1030-104	45 7 1	4		5			
<u>V:1000-1200</u> B: N (02:00) Doe T	B: N (00:14 Doe T Jane	Type Call In:	Time 10:33	Caller ID Caller ID Is Not Available				
Jane		Call Out:	10:47	Caller ID Is Not Available				

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.

Schedule	Visit Info	Bill Info
Visit Information		
Scheduled Time:	1030-1045 Add Pre-Shift	Add Post-Shift (i)
Visit Start Time:	1033 12/04/2015	Visit End Time: 1047 12/04/2015
🖄 EVV Call In:	10:33 12/04/2015	📩 EVV Call Out: 10:47 12/04/2015

**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.

EVV Time	EVV Type	<u>Status</u>	Duration	<u>Tasks</u> Performed	CallerID	Linked By	Linked Date	Unlink
12/04/2015 10:47 AM	GPS Out (Doe Jane )	Success	0	5	N/A	jfranqui	12/04/2015 12:25 PM	Unlink Call
12/04/2015 10:32 AM	GPS In (Doe Jane )	Linked Manually	0		N/A	jfranqui	12/04/2015 12:24 PM	<u>Unlink Call</u>
12/04/2015 10:32 AM	Verification	Auto Verification (Call Maintenance)	o		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

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 process guide provides the general steps to review exceptions, link calls, and reject calls. Managing individual exceptions and polices is the responsibility of each individual Agency. This guide does not cover steps for managing individual 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 Visit > Call Dashboard to access the Call Maintenance page.
	Click <b>Search</b> to access the following:
	• all "held" EVV on the Call Maintenance page (leaving search filters blank; or
2	• specific EVV based on search criteria using the available filters such as <b>Status</b> ,
	Coordinator, or From/To Date.



Step	Action										
	Call Maintenance Call Maintenance Call Maintenance Call Maintenance Caregiver Last Name: Caregiver Last Name: Caregiver Last Name: Caregiver Code: Admission ID: Patient Last Name: Patient Name: Patient Name: Patient Name: Coordinator: Addition: Patient Code: Patient Name: Coordinator: Addition: Patient Name: Score State: S										
	Call Maintenance Filters										
	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										
	below.										
	Search Results Total Calls (22)           Assian_ID#         Carceiver/Carceiver Name         Carceiver Phone         Carceiver Team         Edicnt Name         Call Date         Call Call Type Caller ID         Status           100022         1022         Handler, Stuart         Phone1 : 666-777-6666         08/25/2015 16-03         10 H         666-777-6666         Call Type Caller ID         Status           100030         0222         Status         Phone1 :         Miller Matt (900028)         08/25/2015 15-03         10 H         977-677-677         Voit Verified by Different caregiver           100031         0223         Straus Kim         Phone1 :         Miller Matt (900028)         08/25/2015 15-03         10 H         977-677-677         Voit Verified by Different caregiver           100031         023         Straus Kim         Phone1 :         08/25/2015 15-03         10 H         977-697-6970         Voit Verified by Different caregiver										
	2004 All All All All All All All All All Al										
ч	Unlinked Calls										
5	Columns nightighted in <b>RED</b> indicate the Caregiver placing the confirmation. Information based on										
	the Time and Attendance PIN of the Caregiver placing the EVV confirmation.										
	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.										
	Columns highlighted in <b>ORANGE</b> indicate the <b>reason</b> why the Caregiver's EVV was not										
	automatically linked to a scheduled visit										
	Click on the Carogiver Name (link) to view the Carogiver's scheduled visits for the day. Visit										
	details displaying a nerver (as illustrated)										
	details display in a popup (as illustrated).										
	Caregiver Caregiver Name         Caregiver Phone         Caregiver Team         Patient Name         Call Date         Call Type         Caller ID           Code										
4	1022         Hancher Stuart         Phone 1: 666-777-6666         08/25/2015         16:03         IN H         666-777-6666           Displays only active patients         Image: Control of the second sec										
	Caregiver Code         Caregiver Name         Patient Number         Patient Name         Coordinators         Phone         Visit Date         Schedule         Visit Link         Edit           1022 Edit         Hancher         900021         Ramirez Lonnie         Brian         Phone1:111-123-         08/25/2015         1600-         Edit										
	Stuart         4567 Edit         2200 Edit           Phone2 : Edit         Phone3 : Edit         200 Edit										
	Caregiver Schedule										
5	Click the number in the Caller ID column to view the Patient's scheduled visits for the day (as										
J	illustrated.										



Step	Action											
	1024 Wither Displays only act	s Bill	Phone1 : Phone2 :		08/25/2015 13:55			IN H	144-144-1444			
	Caregiver Code	Caregiver	Patient Number	Patient	Coordinators	Phone	Visit Date	Schedule	Visit	Link	Edit	
	1024 <u>Edit</u>	Withers Bill	900023	Appleton Charles	Sally	Phone1 : 682- 461-4658 Edit Phone2 : 343- 745-9356 Edit Phone3 : 144- 144-1444 Edit	08/25/2015	1400- 1630 <u>Edit</u>			Edit New Sche	dule
					Patient	Schedules						



#### 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.

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

**Phone Number Not Found Status** 

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







Step			Actio	on						
	The Caller ID now matches a number on the Patient's Profile. The status on the Call Maintenance									
	page changes to Issue Fixed: Linkable Call, allowing the EVV to be linked. Click Link to link the									
	EVV with the visit. The exception is removed from the <i>Call Maintenance</i> page.									
4										
-		Filone	Visit Date	Schedule	VISIL	LIIIK	Lait			
		Phone1 : 987-654-	08/24/2015	0800- 1200 Edit	(	Link	<u>Edit</u>			
		Phone2 : 999-999- 9999 <u>Edit</u> Phone3 : <u>Edit</u>								
			Link Option	Available				1		

#### **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 who live 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							Actio	on						
	Clic	k the G	SPS i	con unde	er the <b>St</b>	<b>atus</b> colui	mn of the	held E\	/V.					
		Caller ID num Caller ID num	ber matches ber does not	a patient, but call details do match any patient in the sy	not allow for automatic ostem.	confirmation.								
1		Search Resul	lts Total C	alls (4)							Auto	omatic Creatio	on of Schedules Reprocess L	egend
T		<u>Assign. ID#</u>	Caregiv Code	er Caregiver Name	Office Name	Caregiver Phone	Caregiver Team	Patient Name	Call Date	Call Time C	all Type	Caller ID	Status	Action
		100060	1060	Perez G	Boris's Office	Phone1 : Phone2 :		Moore Coleen	09/28/2016	13:46	IN H	NA	GPS Signal Out of Range	Reject
		100060	1060	Perez G	Boris's Office	Phone1 : Phone2 :		Moore Coleen	09/01/2016	15:25	IN H	NA	GPS Signal Out of Range	Reject
		100060	1060	Perez G	Bons's Office	Phone1 : Phone2 :		Moore Coleen	09/01/2016	15:25	TN H	NA	GPS Signal Out of Range	Reject
					Cal	l Maintena	nce: GPS Sig	nal Out o	of Range	e Stat	us			
2	The Goo Care the 1) T sele bott	Edit N ogle Ma rdinate egiver' map) i he Me ct the	nem ness as s co ndic app the	ber GPS ( The map ssociated ordinate: cate the c er's Prima licable ac window	Coordina contair with th s at the coordina ary Addr ddress fr to overv	ates windo as a red m e Membe time the E tes of wh ress is sele rom the d write the o	ow opens, arker (A), r's address EVV was pl ere the EV ected by de ropdown. Google coo	display which i s and a aced. T V was efault. I 2) Sele ordinat	ving the Indicat blue n The <b>Lat</b> placed If mult ct the s	e coc es th narke iple a <i>Save</i> h the	e cu e cu er (f e ar add <i>Co</i>	nates urren 3), wl nd <b>Lo</b> resse <b>ordin</b> V coo	s of the EVV u at Google Map hich indicates <b>ngitude</b> fields as are on recon <b>ates</b> button a prdinates.	sing the (above rd, then t the



Step	Action
	HHA Exchange - Edit Patient GPS Coordinates
	Patient Address: 28 West Flagler St, MIAMI, FL, 33130
	Latitude: 25.774917 Longitude: -80.196277 View on Map
	Map       Satellite       NV 31 st       Lyric Theate       Image: College         NW 31 st       NV 6 st       NV 6 st       NV 5 st st       Image: College       Image: College         NW 31 st       NV 6 st       NV 6 st       Image: College       Image: College       Image: College         NV 41 st       NV 6 st       NV 6 st       Image: College       Image: College       Image: College         NV 41 st       Image: College       NV 6 st       Image: College       Image: College       Image: College         NV 41 st       Image: College       Image: College       Image: College       Image: College       Image: College         NV 10 st       Image: College       Image: College       Image: College       Image: College       Image: College         NV 11 st       Image: College       Image: College       Image: College       Image: College       Image: College         Structure       Image: College       Image: College       Image: College       Image: College       Image: College       Image: College         NV 10 structure       Image: College       Image: College
	this estimation is not precise, which can result in incorrect GPS confirmations via the HHA Exchange Mobile App.
	will be used in future GPS confirmation for this Patient Address.
	Google Coordinates (Red Marker) and EVV Coordinates (Blue Marker)
	Note: The Latitude and Longitude values in this window may not be edited; these represent EVV data
	received by HHAX.
	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.
3	HHA Exchange - Confirm         You are attempting to update the GPS coordinates for this Patient         Address. This will be used for all future GPS confirmations made by         Caregivers using the HHA Exchange Mobile App. Do you wish to         continue?
	On the <i>Call Maintenance</i> page, click the <i>Search</i> button to prompt the system to reevaluate the
	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).
4	Call Maintenance       (194)       (40)       (1)       (9)       (2)<
	Search Results Total Calls (0) Automatic Creation of Schedules Lagend
	EVV Reprocessed



#### **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#	<u>Caregiver</u> <u>Code</u>	<u>Caregiver Name</u>		<u>Call Date</u> 玊	<u>Call Time</u>	<u>Call Type</u>	Caller ID	<u>Status</u>	Action
100023	<u>1023</u>	<u>Capelli Peter</u>	5	08/24/201	11:56	<u>IN H</u>		Caller ID Not Available	<u>Reject</u>

**Caller ID Not Available** 

Step	Action										
	Click on Peter's name under the Caregiver Name column to confirm the visit on 8/24. This										
	opens a menu containing additional schedule information.										
	Caregiver Caregiver Name         Caregiver Phone         Caregiver Team         Member Name         Call Date         Call Time         Caller ID										
	1023     Capelli Peter     Phone1:     Displays only active patients										
	Caregiver Code Caregiver Member Number Member Name Coordinators Phone Visit Date Schedule Visit Link Edit										
1	1023 Edit         Capelli Peter         900022         Del Valle Rebecca         Brian         Phone1 : 485-857- 4766 Edit         08/24/201         1200- 1700 Edit           100-         100-         1700 Edit         100-         1700 Edit         100-										
	Caregiver Schedule										
	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 Link option does not appear.										
	Click on the <u>Edit</u> link to open the visit details and select the Timesheet Required checkbox. To										
	verify this visit, the caregiver must submit a physical, signed timesneet to confirm the shift.										
	Duty Sheet POC: 0(00:00) Others: 0(00:00) Total: 0(00:00)										
2	✓ Timesheet Required										
	Timesheet Required										
	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.										
	On the Call Maintenance page, click the <u>Reject</u> hyperlink under the Action column.										
2	Assign. ID# Caregiver Caregiver Name AD Status Action										
3	100023 1023 Capelli Peter										
	Reject EVV Link										



Step	Action
4	Click <i>OK</i> 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>Rejected Calls</i> page and search for the applicable rejected call.
	In the results, locate the call and click the <i>Information bubble</i> for details.
2	Search Results Total Calls (3)         Reprocessing office Name Caregiver Phone Caregiver Team Patient Name Call Date Call Time Call Cyce Caller 10 Status         100651       1055       Smith-Jack       Citi Caregivers       Phone 1:       Phone 2:       Fisher Max       03/15/2016 131:49       1N       NA       Concerdence of Caregivers       Phone 2:       Fisher Max       03/15/2016 10:46       OUT       NA       Citi Caregivers       Phone 1:       Fisher Max       03/15/2016 10:17       1N       NA       Citi Caregivers       Phone 1:       Fisher Max       03/15/2016 10:17       1N       NA       Citi Caregivers       Phone 1:       Fisher Max       03/15/2016 10:17       1N       NA       Citi Caregivers       Phone 1:       Fisher Max       03/15/2016 10:17       1N       NA       Citi Caregivers       Phone 1:       Fisher Max       03/15/2016 10:17       1N       NA       Citi Caregivers       Phone 1:       Fisher Max       03/15/2016 10:17       1N       NA       Citi Caregivers       No       Schedule on Calendar       O         Rejected Calls
3	The Call Rejection Details popup opens containing details such as who rejected the EVV, date and time of rejection, and a <u>Reverse Call Rejection</u> link. Click on the link to continue.  Call Rejection Details  Rejected By  Time MarkNE  03/15/2016 11:10:10 AM  Reverse Call Rejection
4	Call Rejection Details Popup
4	
5	The EVV is removed from the <i>Rejected Calls</i> page and routed back to <i>Call Maintenance</i> .
6	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.



# **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
Missed In	an EVV is not received within the set <b>Unbalanced Tolerance</b> at the <u>start</u> of a visit. Visits remain on this page for one day, or until a <b>Visit Start Time</b> is entered.
Missed Out	an EVV is received for the start of a visit, but not within the <b>Unbalanced</b> <b>Tolerance</b> range at the end. Visits remain on this page for two days or until a <b>Visit End Time</b> is entered.
Missed Call	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 Visit > Call Dashboard > Missed Out and generate a search for held visits.
	In the search results, each line item contains relevant visit info including a <i>Find Calls</i> button.
2	Select the <i>Find Calls</i> button to search for EVVs on the Call Maintenance page to link to the visit.



Step		Action						
	Assign.ID P	Patient Name         Office Name         Phone         Adm.ID         Vendor         Carceyberr Name         Visit Date -         Coordinators         Schedule         Contract         Discipline/sure         Carceyberr         Condition         Condition <th></th>						
		Visit Details						
	If the E\	VV matches the visit information, click on Link to link the EVV to the visit. If no call						
	matche	es, click the <i>edit</i> icon to navigate to the visit to manually edit.						
	Link C Sear	Call Out Edit Visit						
3	Call 08/25	Date Call Time Caregiver Name Patient Name Reason #						
		Cancel Click the <i>Edit</i> icon if no calls match the Visit.						
		Linking EVV						
	Note: A	manual confirmation should only be completed once the Agency has a Timesheet verifying the Visit	-					
	End Time	e.						
	On the	Visit Info tab, manually update the necessary confirmation details based on the Agency's						
	internal	I policies Select the New Reason from the required field						
	interna							
		Schedule Visit Info Bill Info						
		Visit Information						
		Scheduled Time:         1500-2000           Visit Start Time:         1450           OB/25/2015         Image: 2000           OB/25/2015         Image: 2000						
4		2         EVV Call In: 14:59         08/25/2015         EVV Call Out:						
		* New Reason: Aide forgot to call in/out  Action Taken: Select						
		New Note:						
		Manual Confirmation						
	<b>Note:</b> De	epending on the <b>New Reason</b> selected other fields may become required (such as <b>Action Taken</b> or						
	New Not	<b>te</b> ). Required fields are denoted with a red asterisk.						
	As best-	-practice, select the entity who verified the visit as well as the date and time of						
	verificat	tion. 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.							
5		Verified By:  Patient Caregiver Family Member Other						
		Date Verified:         08/26/2015         Time Verified:         1100						
		Duty Sheet POC: 0(00:00) Others: 0(00:00) Total: 0(00:00)						
		✓ Timesheet Required						
		Audit Information						



#### **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.









# **EVV-Based Visit Scheduling and Confirmation**

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)
	Identify incoming EVV placed for Patients under a specific
on EVV Confirmation	<b>Contract</b> and using the confirmation details to schedule and confirm the visit.
	Review all EVV received by the system that could not be
Automatic Creation of Schedules	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 Admin > Contract Setup > Contract Search and select a Contract.
2	Select the Scheduling / Confirmation tab at the top of the page and scroll to the Scheduling
۷	Configuration section.



In the Scheduling Configuration section, select the Automatic Visit Creation Based on EVV Confirmation checkbox. Click the Save button to finalize. Contract Setup (Caring Hands LLC) General Billing Rates Billing/Collections Scheduling/Confirmation Eligibility Quickbooks Notes/Uploads 3 Scheduling Configuration Authorization Required: 🗹 🛈 Service Code Required in Authorization: Apply Authorizations toward TT/OT on Missed Visits: Authorization Week: Agency Profile Allow Masterweek Rollover without Valid Authorization: Authorization: Confirmations: Auto-Confirm Visit End Time (Skilled Visits): Disable Visit Schedule Rounding: 📃 🕦 Save **Automatic Visit Creation Based on EVV** 

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		Actio	1						
1	Navigate to <b>Patient &gt; Patient Search</b> and select a Patient.								
	In the Patient Profile,	open the Contracts page and	check for the <b>Servic</b>	e Code.					
	Patient Info - Active Name: McBride Harriet DOB: 01/01/1910	Admission ID: LIC-56789 Primary Alt. Patient ID: 12345	Patient ID: 345678 Home Phone: <u>973-747-2712</u>	Contract: Caring Hands LLC Address: 1 court square, LONG					
2	Coordinators: Jon Franqui	Office: Long Island City	Languages:						
	Placement Contract Is Primary	Alt Patient Service Start Date Source Of Code	Discharge Date <u>Discharge To</u>	Add					
	911660 Caring Hands LLC 년	12345 H 12/02/2015	Edit	Additional Info - HCFA Additional Additional 1500 Info - UB-04					
		Patient Contract Page	– Service Code						
2	If no Service Code is a	ssociated with the Contract, c	lick the <u>Edit</u> link und	ler the Service Code					
Э	column and select a co	ode.							





ер							A	ction					
		Patient Info	D - Active Name: McBrid DOB: 01/01 ators: Jon Fr <u>Contract</u> Caring Hands LLC	de Harriet /1910 ranqui Is Primar Contract	y Alt Patient ID 12345 년	Adm Primary Alt. F Service Start Date 12/02/2015	ission ID: LIC- atient ID: 1234 Office: Long Source Of Adm	55 Island City Service Code Select- HHA Live-In HHA Live-In HHA Standard Home Managemely Mutual HHA Non-Billable Nutrition PCA Live In PCA Live In PCA Live In PCA Live In PCA Live In PCA Code Skilled Basic Test Code Test Service Code Ult Service Code	Patient Home Pho Languag	ID: 345678 nne: <u>973-747-27</u> jes: Date <u>Dischard</u>	12 1e To X	Contrac Address	t: Caring Hands : 1 court squar- b ISLAND CITY, : : : : : : : : : : : : :
4	Once Code	a <b>Servi</b> for the Patient Info - Nan DC Coordinato Contracts	Ce Coor Contr Active me: McBride H DB: 01/01/19: srs: Jon Franq Contract Tr C	de is s ract. tarriet 10 Lui s Primary	elected, Prim	Admission ary Alt. Patient of	e Upda	te link. The Pi Hom City La e Code Disc	tient ID: 3456 e Phone: 973- nguages:	78 -747-2712		Default	Service
								Chandard T			LIGEA AFA	and the second	Auditional

**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.

era		1
Nurse: Select V	* Coordinator: Jon Franqui 🔻	
Caregivers with Access to Patient Info via Mobile App: Select V ()	Coordinator 2: Select	
EVV Required: 🖉 Change will take effect on the following day	Coordinator 3: Select	
Disable Automatic Visit Creation 🗹 🛈	Service Request Start Date: 12/02/2015	
Enable FOB Confirmation:	Projected DC Date:	
Service Type: 🗹 Multiple Services 🕦	Source Of Admission: Select	
Cluster	Timesheet Required (Skilled): 🔲 🕦	

#### **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 Admin > Reference Table Management.



Step	Action							
	Select the Caregiver Pay Code Reference Table dropdown.							
2	Reference Table Management							
_	Click the <i>Search</i> button to view the existing Pay Codes. To add a new Pay Code, click the <i>Add</i>							
3	button.							
4	The Caregiver Pay Code window opens. Complete the required fields (denoted with red asterisks). Select the Default Visit Rate checkbox.							
	Set Default Visit Rate							
5	Click the <i>Save</i> button to finalize. Moving forward, the system automatically applies this Pay Code to visits scheduled with the associated discipline.							



#### Automatic Creation of Schedules Function

Refer to the <u>Automatic Creation of Schedules Job Aid</u> for details and instructions.



# **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.





tep						Action					
	Last 3 authorizations Fauture last a linear Data To Data Discription from factor last units for state Trans. Insuine lasts is by it by it is in generations their i										
		Caring Hands LLC 12345	12/01/2015 03/31/20	116 HHA H	HA Standard N/A	H Calendar.	ourly Daily	0.00 0.00 4	00 4.00 4.00 4.00	4.00	0.00 🗙
		Schedule is disabled in case of m     PREVIOUS WEEK	nultiple payers.		2/7,	/2016-2/13/2	2016			N	EXT WEEK 🕨
		<u>Get Prebilling</u> 2/ <u>Status</u> (Su	7/2016 unday)	2/8/2016 (Monday)	2/9 (Tu	/2016 asday)	2/10/2016 (Wednesday)	2/11/2016 (Thursday)	2/12/20 (Friday	16 2/1 ) (Sa	3/2016 turday)
		Call In/Out:			1000 14			1000 1400			
		Override/Conf: () TT/OT: H: ()	M: 00	H: 00 M: 00	1000 14	00 🗹 04:00 📕	ол. м: 03	1000	H: (0) M: (0)	н: 00 м	: 00
		TS Req/App: Req:	App:	Req: App:	Req: A	pp: 🗹 Req:	App:	Req: App: ✓ Caring Hands LLC	Req: App:	Req:	App:
		Pri. Svc. Code:	× ×		HHA Standa	rd V	⊻ 	HHA Standard	×		
		* Reason: Timeshe	et Received	Action	n Taken: Timesheet	Verified	~		<u> </u>		
		Notes:					$\sim$				
		Duties	Additional Bill Info								
					Sea	arch Resu	llts				
	Note: If the	he Caregiver d	id not have	e a visit d	on a cert	ain day,	or the v	isit is in t	he future	e, the fie	lds are
	unavailab	ole. Use the <b>Pre</b>	evious We	ek and N	lext We	<b>ek</b> icons	above th	ne search	results t	o navigo	ate to oth
	Caregiver	visits (workea	l by or sch	eduled fo	or).						
	Clickon	the Duties lie			of the m		ontor D(		c for th		
	Click on the <b>Duties</b> link at the bottom of the page to enter POC Duties for the applicable visit										
	Check off	line <u>Dulles</u> in	nk at the k	oottom	or the p	age to t					
	the selec	tted week. Du	ik at the t uties may	oottom only be	e applie	d to sch	eduled	visits.			
	the selec	ited week. Du	ik at the k uties may	oottom v only be	e applie	d to sch	eduled	visits.			
	the selec	itted week. Du	ik at the t uties may	oottom only be	e applie	d to sch	eduled	visits.		P • 1	
	the select	itted week. Du left-side che	nk at the b uties may ckbox to	oottom v only be apply de	e applied uties for	d to sch r all edit	eduled table vis	visits. sits or cli	ick on in	ıdividua	l days to
	the selec Click the specify v	the <u>Duttes</u> in ted week. Du left-side che vhich duties v	ik at the t uties may ckbox to were perf	oottom oonly be apply di	e applied uties for (or refu	d to sch r all edit sed) ind	eduled table vis lividuall	visits. sits or cli y.	ick on in	dividua	l days to
	the selec Click the specify v	the <u>Duttes</u> in ted week. Du left-side che vhich duties v	ik at the t uties may ckbox to were perf	oottom only be apply dr	uties for (or refu	d to sch r all edit sed) ind	eduled table vis lividuall	visits. sits or cli y.	ick on in	idividua	ll days to
	click the select Click the specify w	the <u>Duttes</u> in ted week. Du left-side che vhich duties v <u>Caregiver: Ande</u>	ik at the b uties may ckbox to were perf	oottom only be apply di	uties for (or refu	d to sch r all edit sed) ind	eduled table vis lividuall	visits. sits or cli y.	ck on in Patient:	Idividua	ıl days to
	Click the specify w	the <u>Duttes</u> in ted week. Du left-side che vhich duties v <u>Caregiver: Ande</u> Task eine phone smust be confirmed before du	Ik at the t uties may ckbox to were perf rson Rebecca	oottom only be apply dr	uties for (or refu	d to sch r all edit sed) ind	eduled table vis lividuall	visits. sits or cli y.	ck on in Patient:	Idividua	Il days to
Ļ	Click the specify w	the <u>Duttes</u> in ted week. Du left-side che vhich duties w <u>Caregiver</u> : Ande Task in POC Task entered by phone s must be confirmed before du Duty Name (Minutes)	Ik at the k uties may ckbox to were perf rson Rebecca uties can be entered.	oottom only be apply du formed	e applied uties for (or refu week	d to sch r all edit sed) ind	eduled table vis lividuall /2016	visits. sits or cli y.	Patient:	McBride Harriet	2/13/2016
ŀ	click the select click the specify w	the <u>Duttes</u> in ted week. Du left-side che vhich duties v <u>Caregiver: Ande</u> Task entered by phone a must be confirmed before du Duty Name (Minutes)	Ik at the t uties may ckbox to were perf rson Rebecca uties can be entered. Fre	oottom only be apply du formed (	e applied uties for (or refu weeks 2/7/2016 (Sunday) © ©	d to sch r all edit sed) ind and Date: 2/13, 2/8/2016 (Monday)	eduled table vis lividuall /2016	visits. sits or cli y.	Patient: 2/11/2016 (Thursday)	McBride Harriet	2/13/2016 (Saturday)
	the select Click the specify w	the <u>Duttes</u> in ted week. Du left-side che vhich duties v Caregiver: Ande Task in POC Task entered by phone s must be confirmed before di Duty Name (Minutes) 100 - Bathrom Assistance 101 - Bathrom Assistance	Ik at the k uties may ckbox to were perf rson Rebecca uties can be entered. Fre	apply de cormed ( cormed (	e applied uties for (or refu week	age to t d to sch r all edit sed) ind and Date: 2/13, 2/8/2016 (Monday) € €	eduled table vis lividuall /2016	visits. sits or cli y.	Patient:	McBride Harriet	2/13/2016 (Saturday)
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Step	Action
	9         S:1000-1400         T         (i)         V:1000-1400         B:         N (04:00)         Anderson         Rebecca
	Visit Confirmed



### **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
	Navigate to Action > Confirm Visits and specify a date range using the From/To Date fields. The
	<b>Display</b> value selected dictates the information to view in the search results. Once search
	narameters are chosen, click the <b>Go</b> button
1	Search Visits         * To Date:         02/29/2016         Office(s):         Select         Discipline:         All         V
	Admission ID:2 Contract: All Patient Last Name: Patient First Name: Visit Status: Unconfirmed Caregiver Code: Caregiver Last Name: Caregiver First Name: Caregiver First Name: Caregiver Code: Caregiver Last Name: Caregiver Last
	Display: © Schedule ○ Visit ○ Bill Info ○ Visits Pending Timesheets
	Co Close
	Display Values
	As illustrated in the image below, the <b>Display</b> value selected is <i>Visit</i> . The search results provide
	information available on the Visit tab as well as any open fields. Enter or edit the applicable
	information.
	When values for these fields are entered, the system highlights the $\Gamma(V)$ in even so indicating that
	when values for these fields are entered, the system highlights the EVV in orange indicating that
	there is sufficient information to generate a visit.
2	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.
	Visits Page 1 Of 1
	ID         Name         Code         Time         Code         Time         Duration         Duration           v         02/05/2016         LIC-900013         Davis         Long Island Sammy         HHA         Crystal Billy         1005         Heaven's 0800         1000         0800         02/05/2016         III         - 1600         02/05/2016         IIII         - 1600         02/05/2016         IIII         - 1600         02/05/2016         IIII         - 1600         02/05/2016         IIIIII         - 1600         02/05/2016         IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII
	✓         02/08/2016         L1C-900013         Sammy         City         Instantism         Constantism         Care         0000/1200 (000/120/00/2016)         1/1/20/09/2016         04:00         00/100         Sammy         City         Care         0000/1200 (000/120/00/2016)         1/1/200 (02/09/2016)         04:00         00/100         Sammy         City         Care         0000/1200 (000/120/00/2016)         1/1/200 (02/09/2016)         04:00         00/100         Sammy         City         Care         0000/1200 (000/120/00/2016)         1/1/200 (02/09/2016)         04:00         00/100         Sammy         City         City         City         Care         0000/1200 (000/120/00/2016)         1/1/200 (02/09/2016)         0/
	✓       02/10/2016       LIC-900013       Sammy       City       HHA       Crystal Billy       1055       Care       080012/200 (8000 02/10/2016)       - 1200 (92/10/2016)       04:00       000000       Same
	02/12/2016         LIC-900002         Hands         L000_1400         02/12/2016         -         02/12/2016         00/000         Save X           001/12/0016         LIC-900002         Hands         L000_1400         02/12/2016         -         02/12/2016         00/000         Save X
2	Once complete, click the <b>Save</b> button to undate all selected records in bulk
5	once complete, click the <b>Juve</b> button to update all selected records in bulk.



### **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 Visit > Edit Services.
2	Specify the Office and Week Ending Date (required) fields. Enter either a Patient or Caregiver to update (optional). Click Search to continue. Edit Services * Office: Atlantic Avenue Contract: All Visit Status: All V Patient: James Patricia (AAO-90002) Last Name, AdmissionID Last Name, Caregiver Code, Assingment ID, SSN * Week Ending Date: 08/09/2015
	Search Filters
	division.
3	Image: Previous Week         08/03/2015 - 08/09/2015         Contract         Service Code         Timesheet         Image: Previous Code         Image: Previous Code <th< th=""></th<>
4	Enter a new Schedule Time, Confirmation, Service Code, and Timesheet for the new visit.
	Once all changes have been made, click the <i>Save</i> button to update information in bulk for all
5	adjusted visits. Changes may be reviewed on the Patient's Calendar. as illustrated in the following
	image.





Step	Action
	12         S:1000-1100         B: N (01:00)         Abreu         Alex         S:1100-1200         B: N (01:00)         B: N (01:00)         Abreu         Alex         S:1200-1400         B: N (02:00)         Abreu         Alex         Divided Visit



# **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:
  - o 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.



Image: Section:       Visit       ✓         Menu       Admin       ✓         Visit       Ø H       EditCallAudit       Ø         Visit       Ø H       Call Dashboard       Ø H         Call Dashboard       Ø H       Ø       Ø         Call Dashboard Conexus Message       Ø       Ø       Ø         LinkCall       Ø       Ø       Ø       Ø         AllowLinkingUnrecognizedNumber       Ø       Ø       Ø       Ø         Call Dashboard Corrections       Ø       Ø       Ø       Ø       Ø         Allow Linking Unrecognized FDB       Ø       Ø       Ø       Ø       Ø         Allow Linking Unrecognized FDB       Ø       Ø       Ø       Ø       Ø         Allow Linking Unrecognized FDB       Ø       Ø       Ø       Ø       Ø         Allow Linking Unrecognized FDB       Ø       Ø       Ø       Ø       Ø       Ø	Edit Roles		
* Section: Visit       Search         Menu       Admin         Visit       H         EditCallAudit       Image: Admin and the second and the secon	dit Roles		
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Menu       Admin         Visit       Image: Linking Unrecognized FOB       Image: Linking Unrecognized FOB         Allow Linking Unrecognized FOB       Image: Linking Unrecognized FOB       Image: Linking Unrecognized FOB			
Menu       Admin         Visit       Image: Admin         EditCallAudit       Image: Admin         Model: Admin       Image: Admin         Call Dashboard       Image: Admin         Call Dashboard Conexus Message       Image: Admin         LinkCall       Image: Admin         Call Maintenance       Image: Admin         UnlinkCall       Image: Admin         AllowLinkingUnrecognizedNumber       Image: Admin         Call DashboardCallMaintenance       Image: Admin         Call Dashboard Corrections       Image: Admin         Allow Linking Unrecognized FOB       Image: Admin         Allow Linking Unrecognized FOB       Image: Admin         Allow Linking Unrecognized GPS       Image: Admin			
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Permissions: Allow Linking Unrecognized Number/FOB/GPS



# **Tracking Location Where EVV is Performed**

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												Add
Address Line 1	Address Line 2	City		State	County		* Zip		Primary	Address Type(s)	Notes	
123 Test Road		MIAMI		FL 🗸	Miami-dade	~	33130 -	Ц	$\checkmark$	[Multiple]	✓ <u>Add</u>	X
456 Here Street		MIAMI		FL 🗸	Miami-dade	~	33145 -			[Multiple]	✓ Add	×
Phone Number Information					_							
		Home Phone: 30	5 - 305 - 3055									
•	Home	hone Location: 12	3 Test Road, MIAMI, F	L, Miami-dade 🔽			•					
		Phone 2: 78	6 - 786 - 7866									
	Ph	one 2 Location: 12	3 Test Road, MIAMI, F	L, Miami-dade 🗸			Descrip	÷.,				
		Phone 3: 30	5 - 786 - 3057									
	Ph	one 3 Location: 45	i6 Here Street, MIAMI,	FL, Miami-dad 🗸			Descri,					
		Direction:										
	Alternate	Billing Address: 🗌										

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	
Home Phone:	111-111-1111
Home Phone Location:	AURORA, SD, Brookings, 57002, Canarys street
Phone 2:	222-111-1111
Phone 2 Location:	NEW YORK, NY, New York, 10001
Phone 3:	333-111-1111
Phone 3 Location:	AURORA, SD, Brookings, 57002, Canarys street
Direction:	
Alternate Billing Address:	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.





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).

Patient Info - Active			
Name: Tracker EVV	eeeee	Admission ID: EXQ-900(	0205985385515
General			
	Nurse:	Select	
Caregivers with Access to	Patient Info via Mobile App:	Select 💙 () ()	
	EVV Required:	Change will take effect on the following day	
Disable Automatic Visit Creation	Based on EVV Confirmation:		
	Enable FOB Confirmation:	☑ 123456 (FOB Device ID)	
	FOB Seal ID:	1111111111111111111	
	FOB Location:	XXX, MIAMI, FL, Miami-dade, 33130	
E C C C C C C C C C C C C C C C C C C C	nable Beacon Confirmation:		,,,,,,,
	L		
			Save Cancel

Only one address can be associated with the FOB device.

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).



#### 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.



Patient Info - Active			\ \
Name: Tracker EVV		Admission ID: EXQ-900020	5985385515
	******	Finky A. Polep TD:	****
		<ul> <li>Non-Non-Non-Non-Non-Non-Non-Non-Non-Non-</li></ul>	iens recuids connecte
General			
	Nurse:	Select 🗸	
Caregivers with Access	to Patient Info via Mobile App:	Select 🗸 🚺 🗓	
	EVV Required:	$\checkmark$ Change will take effect on the following day	
Disable Automatic Visit Creat	ion Based on EVV Confirmation:		
	Enable FOB Confirmation:		
	Enable Beacon Confirmation:	☑ 1234567 (Beacon Device ID)	
	Beacon Location:	XXX, MIAMI, FL, Miami-dade, 33130	
	Service Type:	Unitiple Services (i)	eree

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).



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 <u>Link</u> 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	Careob	ver Name	Office Name	Caregiver Pho	one	Caregiver Team Patient	Name	Call Date ≚	Call Time	Call Type	: Caller
3140	jensen i	david	HHAeXchange Office Excellence	Phone1 :		phi one patient		11/11/2019	11:38	INH	NA
	0					Phone3 : 111-222- 9999 Edit					
8140 <u>Edit</u>		jensen david	9100205	ohi one patient	Albert Noble	Phone1: 333-333- 3333 Edd Phone2: 999-111- 9999 Edd Phone3: 111-222- 9999 Edd	11/11/2019	0945- 1000 <u>Edit</u>		Link	Edit
8140 <u>Edit</u>		jensen david	9100205	ohi one patient	Albert Noble	Phone1: 333-333- 3333 Ede Phone2: 999-111- 9999 Ede Phone3: 111-222-	11/11/2019	1000- 1015 <u>Edit</u>		Link	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.

Arrianm	ant ID: 003027		Coordinate	are: Abal Bra"ath122	
Assignin	ent 10: 003027		Coordinati	DEST ADEI DIE BUITZS	
Schedule	Visit Info	Bill Info			
mation					Histor
Scheduled Time: 01	00-0200				
Visit Start Time:	08/04/2019		Visit End Time:	08/04/2019	Link Calls
Missed Visit:	1		Travel Time Request:		Link Call In Link Call Out
t 3 notes:					
Bancon	Action Taken	Note	User	Date/Time	

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).



	Schedule	Visit Info	Bill Info	
Visit In	formation			
Sch	eduled Time: 0045-014	5		
Visi	t Start Time: 0046	01/08/2020		Visit End Time: 0149
2	EVV Call In-	His	tory	EVV Call Out: 01:49
	FOB ID: 333444		1	<u>Travel Time</u> <u>Request:</u>
	Address: 08401		No Data	Found.
*	Update Address	<b>i</b>	•	* Action Taken: Sele

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.

Home Phone:	999 - 999 - 9999	
Home Phone Location:	Select 🔻	
Phone 2:	999 - 999 - 9999	
Phone 2 Location:	Select 🔻	
Phone 3:	444-444-4444	
Phone 3 Location:	Select 🔻	
	Select	
	1 Court Square West, LONG ISLAND CITY, I LONG ISLAND CITY, NY, Queens, 11101	NY, Queens,



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.

Enable F	OB Confirmation:	(FOB Device ID)
	FOB Seal ID:	
	FOB Location:	Select 🔻
Enable Beac	on Confirmation:	<ul> <li>(Beacon Device ID)</li> </ul>
[	Beacon Location:	Select 🔻
Frequency:		Select
Mutual Case With:		1 Court Square West, LONG ISLAND CITY, NY, Quee LONG ISLAND CITY, NY, Queens, 11101

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.



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 (<sup>x</sup>) 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.

Schedule	Visit Info	Bill Info	Verification	1	
Visit Information					History
Scheduled Time: 0500-	-0600 Add Pre-Shift	Add Post-Shift	(i)		
Visit Start Time: 0500	07/05/2022	Visit End Time:	0600 07/05/2022		
EVV Call In: 05:00	0 07/05/2022	🕿 嵐 EVV Call Out:	06:00 07/05/2022		
GPS Coordinates	<u>History</u> : -170.778006,88.084156	тт/от:	H: 00 M: 00		
Address	30 Fremont Ave, Holbrook, NY, 11741	No	Data Found.		
Service Location Type	: Home	<b>`</b>	Action Taken:	Select V	
New Note:					

#### 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.



it EVV Information			
All fields marked with an asterisk (*) are required. Confirmation Type IVR (CALLERID) Clock-In Latitude NA Address Line 1 * 760 Park Ave ZIP Code * 11206 • Service Location Type Home	Longitude NA Address Line 2	Service Location Address Other City * BROOKLYN	State * NY
test Cancel			

Edit EVV Information Window

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

Visit Info	Bill Info	Verification			
					E
Add Pre-Shift	Add Post-Shift	)			
07/03/2022	Visit End Time: 0	600 07/03/2022	E an		
07/03/2022	🛎 🎗 EVV Call Out: 06	i:00 07/03/2022			
	тт/от: н	:00 M:00			
Action Tak	en Note		User	Date/Time	
	EVV Clock	k-In Update: test	Sbentuser	8/18/2022 3:49:53 PM	Print
	Visit Info 2600 Add Pre-Shift ] 07/03/2022 IP 07/03/2022 S Action Take	Visit Info Bill Info D600 Add Pre-Shift Add Post-Shift (1) 07/03/2022 III Visit End Time: (0) 07/03/2022 III Visit End Time: (0) 07/03/2022 III Visit End Time: (0) TT/OT: H Action Taken Note EVV Cloc	Visit Info         Bill Info         Verification           0600         Add Pre-Shift         1           007/03/2022         Visit End Time:         0600         07/03/2022           07/03/2022         Visit End Time:         0600         07/03/2022           07/03/2022         Visit End Time:         0600         07/03/2022           07/03/2022         Visit End Time:         06:00         07/03/2022           07/03/2022         TT/OT:         H:00         M:00           Action Taken         Note         EVV Clock-In Update: tegt	Visit Info Bill Info Verification D600 Add Pre-Shift Add Post-Shift 1 07/03/2022  Visit End Time: 0600 07/03/2022  07/03/2022  Visit End Time: 0600 07/03/2022  TT/OT: H:00 M:00 Action Taken Note User EVV Clock-In Update: tegt Sbentuser	Visit Info         Bill Info         Verification           0600         Add Pre-Shift         (a)           07/03/2022         Visit End Time:         0600         07/03/2022           07/03/2022         Visit End Time:         000         07/03/2022           07/03/2022         TT/OT:         H:00         H:00           Action Taken         Note         User         Date/Time           EVV Clock-In Update:         tegt         Sbentuser         Shentuser

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. 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.



Edit Office: Enable Alternate EVV Workflow

\*Refer to the Mobile App (Agency) Process Guide 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 Workflows**

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	Action	Description
	Initiation of the	The Caregiver enters all duties as customary and then presses <b>000</b> to
1	Alternate IVR	pressed to the Voice Varification partian of the call
	Workflow	proceed to the voice vernication portion of the call.
		The Caregiver hears the name of the discipline for the visit. The
		Caregiver <u>confirms</u> or <u>denies</u> that the scheduled Discipline was provided
2	Caregiver Service	during the visit by pressing <b>1</b> for <u>Yes</u> or <b>0</b> for <u>No</u> .
	Verification	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.



Step	Action	Description
		After confirming (1 for Yes) or denying (0 for No) the service performed,
		the Caregiver continues to indicate whether the Patient can perform
		the verification by pressing <b>1</b> for <i>Yes</i> or <b>0</b> for <i>No</i> .
		• If <u>Yes</u> , then the Caregiver hands the phone to the Patient to
2	Hand Phone to	continue the verification process. The Patient can then confirm the
3	Patient	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> .
		• If <u>No</u> , then the Caregiver indicates that the Patient is not able to
		confirm and the call ends.
		The Patient is then prompted to confirm ( <b>1</b> for <b>Yes</b> ) or deny ( <b>0</b> for <b>No</b> )
		the Start Time, End Time, and Visit Duration.
4	Duration Verification	<b>Note:</b> 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 bypassed.
		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>
5	Voice Verification	to hear the recording again. To re-record, press the * key.
		<b>Note:</b> The Patient can provide a voice confirmation regardless of the
		system's ability to match a visit or a Clock-In.
6	End of the IVR Call	After completing the voice verification portion of the call, the system
	Flow	automatically ends the Clock Out.

#### **End to End Call Flow**

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

Step	Action	What the Caregiver/Patient hears
1	Caregiver calls the IVR line and	Welcome to HHAeXchange. Press 1 for call in. Press 2
-	presses 2 to Call Out.	for call out.



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

- 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 attestor 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).

N N	robitom(s): νrobitom(s):	
	Save Close Print	
Audit		History
	Verified By: Datient Caregiver Family Member Other	
	Date Verified: Supervisor:	
Duty S	Sheet POC: 0(00:00) Others: 0(00:00) Total: 0(00:00) Visit Duration: (00:00)	History
🗹 Tin	nesheet Required 🛛 🙀 Timesheet Approved 💦 Upload Scanned Timesheet: 🔤 🕦	
	<b>Documentation Attestation</b> Jon Franqui (03:25 PM, 04/14/2021)	
POC Do No Du	uties ties Found	

Visit Info Tab: Timesheet Approved – Document Attestation Timestamp

To view *Documentation Attestation* history for the visit, click on the <u>History</u> 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.



View History - Non Skilled Visit Duty Sheet Field Name: Documentation Attestation	From Date:	To Date:	
			History
			ervisi n: (o History

**Documentation Attestation: History** 



# **Verification Tab in Visit Info Page**

DISCLAIMER This feature is enabled by HHAX System Administration. Contact the <u>HHAX Support Team</u> for assistance.

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

on Skilled Visit:			Mast	terweek upda
A	dmission ID: BOR-900074		Patient Name: Leemie Greg	
	Visit Date: 12/28/2020		Patient Phone #: 718-438-1200	
Ass	signment ID: 100022		Coordinators: Boris G, Nina Duval	
Schedule	Visit Info	Bill Info	Verification	
vice Verifications				His
Patient Visit	Time Confirmation:			
Serv	ice Discipline Type:		Service Discipline Confirmation:	
	Patient Signature:		Patient Voice Verification:	
vice Exceptions				
		No Exception	ns Identified	

Visit Verification Tab



Any exception to the verification details is captured under the *Service Exceptions* section below the *Service Verifications*, covered in the <u>Resolve Visit Verification Exceptions</u> 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).

e visit illio	Dill Inio	Care Path	Verification	
tions				Histor
ent Visit Time Confirmation: Confi	irmed			_
Service Discipline Type: PCA		Service D	iscipline Confirmation: Confirm	ned
Patient Signature: <u> N</u>	ot Verified	Pat	ient Voice Verification: 🔕 Ver	ified
	tions Int Visit Time Confirmation: Conf Service Discipline Type: PCA Patient Signature: N	tions Int Visit Time Confirmation: Confirmed Service Discipline Type: PCA Patient Signature: Not Verified	tions Int Visit Time Confirmation: Confirmed Service Discipline Type: PCA Patient Signature: Not Verified Patient	tions Int Visit Time Confirmation: Confirmed Service Discipline Type: PCA Patient Signature: Not Verified Patient Voice Verification: Verified Patient Voice Verification: Verified Patient Voice Verification: Verified Patient Voice Verification: Verified

**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).

Visit Info	Bill Info	Care Path	Verification
Service Verifications			Histe
Patient Visit Tin	ne Confirmation: Confirmed		
Service	: Discipline Type: PCA		Service Discipline Confirmation: Confirmed
Pi	atient Signature: <u> Verified</u>		Patient Voice Verification: 🔯 Not Verified
Service Exceptions			

#### **EVV Verification Information**

To view the Patient signature, hover over the **Patient Signature** <u>Verified</u> link. The Patient Signature popup window displays the captured signature.





**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 <u>Alternate EVV Reference Tables</u> section for further guidance.

Schedule	Visit Info	Bill Info	Care Path	Verification	
Service Verifications					History
Patient Visit 1	Time Confirmation: Not V	erified			
Servi	ce Discipline Type: HHA		Service Disc	ipline Confirmation: Resolved	
	Patient Signature: 📉 Re	solved	Patien	nt Voice Verification: 💿 Not Verifie	ed
Service Exceptions Patient Signature Exce Acknowledge Exception:	ption Vinaya Deshmukh (09	:25 AM, 09/09/2020)	*Developing Codes		н

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
Acknowledge Exception	Select checkbox to record the user, date, and time.
*Reason Code	(Required) Select the Reason Code (values from the Reference Table).
*Resolution Code	(Required) Select the Resolution code (values from the Reference Table).
Notes	(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.

	Schedule		Visit Info		Bill Info	
Service	Verification	5				
	Patient Vis	sit Time	Confirmation:	Not Verified	1	
	Se	ervice Dis	scipline Type: H	HHA		
		Patie	ent Signature:	Resolver	đ	
Service	Exceptions					
Patient	t Signature E	xceptior	n			
Acknow	ledge Exception	on: 🔽	Vinaya Deshmu	kh (09:25	AM, 09/09/2020	)
	Reason Co	de: Best	option			
	Reason Co	de: Best	option Not Verifie	d		
	Reason Co Schedule	de: Best	option Not Verifie Visit Info	ed	Bill Info	Ĩ
Service	Reason Co Schedule	de: Best	option Not Verifie Visit Info	ed	Bill Info	Ĩ
Service	Reason Con Schedule	de: Best ( f s sit Time (	option Not Verifie Visit Info Confirmation: F	ed Resolved	Bill Info	ľ
Service	Reason Co Schedule Verification Patient Vi: Se	s service Dis	Visit Info Confirmation: F	Resolved	Bill Info	Ĺ
Service	Reason Co Schedule Verification Patient Vi: Sc	de: Best	option Not Verifie Visit Info Confirmation: f scipline Type: f	ed Resolved HHA	Bill Info	ſ
Service	Reason Co Schedule Verification Patient Vi: Sc Exceptions	s sit Time Patie	option <b>Not Verifie</b> Visit Info Confirmation: f scipline Type: f ent Signature:	ed Resolved HHA	Bill Info	ſ
Service Service Patient	Reason Co Schedule Verification Patient Vi: Se Exceptions	s service Dis Patie	option <b>Not Verifie</b> Visit Info Confirmation: f scipline Type: f int Signature: [	ed Resolved HHA	Bill Info	T
Service Service Patient Acknow	Reason Co Schedule Verification Patient Vi: Sc Exceptions t Signature E reledge Exceptions	s sit Time of Patie xceptior on:	option Not Verifie Visit Info Confirmation: F scipline Type: F ent Signature: Vinaya Deshmu	ed Resolved HHA Resolver	Bill Info	)

Resolved

### **Visit Verification and Exception History**

To view the verification history log for a visit, click on the **<u>History</u>** link in the Service Verifications section.

Select a Field Name to see specific information.



eld Name	Patient Signature	~	From Date:	To Date:	
	Patient Signature				
	Patient Visit Time Confirmation		Search		
	Service Discipline Confirmation	- 1			
	Service Discipline Type				

Service Verification History

To view the history on specific Verification Exceptions fields, click on the respective  $\underline{H}$  link. Based on the selection select the category from the **Field Name** field, as seen in the following image.

HHAeXchange - Skilled Visit Verification Info		×
Acknowledge Exception:	H	^
Reason Code: Resolution Code:		
Notes:		
Patient Visit Time Confirmation Exception		
Acknowledge Exception:	Ħ	
View History - Google Chrome =		
▲ Not secure   development.hhaexchange.com/ShanghaiHHAHistory/ViewHistory.aspx?s=A2A09590-56CA-4866-A12		
View History - Patient Visit Time Confirmation Exception		
Field Name:     Acknowledge Exception       Acknowledge Exception     To Date:       Reason Code     Search	Н	

Visit Verification Exception 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



Refe	Reference Table Management					
	Search					
	Reference Table:	Select V Search				
		Visit Visit Type Visit Edit Reason Visit Edit Action Taken Visit Delete Reason Missed Visits Reason Missed Visits Action Taken Schedule/Bill Info Edit Reason Overtime Override Reason Refused Duty Reason Patient Signature Required Skip Reason Alternate EVV Reason Code Alternate EVV Resolution Code Clinical/MD Order				

**Alternate 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.

Reference Table Management	Enterprise 20.1	0.01 TELXQAUATD01 (Chrome/85.0.4183.102) chrome (Doc Chrome 85) 9/15 11:26 l				
Search						
Reference Table: Alternate EVV Reason	on Code Y Search	Legend				
Search Results (29)	Search Results (29)					
	HHAeXchange - Add Alternate EVV Reason Code	Page 1 of 2   Next Last				
Reason Code 🔺	Alternate EV/V Reason Code	Status				
007 code reson		Active				
Alternate code	* Reason Code: Verbal Verification	Active				
Best option	Stature Active M	Active				
Caregiver discipline verified manually	Status. Active +	Active				
Contract code reason	Save Cancel	Active				
Define code	Save Cuncer	Active				
Derivation code of data		Active				
East reason values to confirm		Active				
Guest code		Active				

Adding an Alternate EVV Reason Code

To edit a **Reason Code**, click on the existing <u>Reason Code</u> (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 <u>Reason Code</u> (link) from the Reference Table and select <u>Inactive</u> 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  $\ensuremath{\textbf{Section}}$  field and select applicable roles from the  $\ensuremath{\textbf{Roles}}$  dropdown.

Assign or Reject Open Shift Request	
View Verification Tab	
Edit Verification Tab	
Caregiver Awake Confirmation Dashboard	
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.