Mobile App Process Guide for Agency

Agency Setup and Management

Document Revision History (Last 2 Years)

Date	Description of Revision
01/04/2021	Added: Mobile Section in the Admin Office Setup page Update: Schedule Time Column Added to the Time Correction Dashboard Added: Prevent Restricted Caregivers from Viewing Patient Information Added features to Caregiver Mobile App
04/15/2021	Added: Mobile App Nevvon Integration Updated: Mobile App Accessibility Guidelines
05/14/2021	Update: GPS EVV Method to Reduce OOR Exceptions (default setting)
08/02/2021	Accessibility standards applies Remove: Care Pathways
8/11/2021	Update: Mobile App Password Reset (Self-directed)
09/30/2021	Add: Warning Confirmation Tolerance Range below 300 Feet Add: Patient Address PIN on GPS Map Confirmation
11/3/2021	Add: Mobile: Extend Visit End Time
12/13/2021	Updated Mobile App images
12/22/2021	Added: Biometric Two-Factor Authentication Added: Community Visits
02/02/2022	Added: Community Visits: Caregiver Level Setting
04/05//2022	Added: Unscheduled Visits: Service Code Selection
08/08/2022	Added: POC Configuration for Other Duties Updated: Case Acceptance Override Enhancements Added: Patient POC on Unscheduled Visits Added: Log Duties Throughout the Shift
08/23/2022	General updates
02/13/2023	Updated: Mobile App Integration Services (formerly Nevvon Integration)

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Overview

The HHAeXchange (HHAX) **Mobile App** is a handy tool providing Caregivers with real-time schedule information. Available for both iPhone and Android, the Mobile App may be used to place EVVs, enter Duties, and request Open Shifts.

Activating the Caregiver's Mobile profile as well as configuring and enabling the various features of the Mobile App is the Agency's responsibility. This guide provides instructions and guidance for Agencies to set up the HHAX Mobile App on their systems.

Please direct any questions, thoughts, or concerns regarding the content herein to HHAeXchange Client Support.

DISCLAIMER
Some **Mobile App** features are activated by System Administration. Please contact HHAX Client Support for details, setup, and guidance.

HHAX System Key Terms and Definitions

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

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

Agency Setup

Mobile Section in the Admin Office Setup Page

To better manage all Mobile functions in the Enterprise system, navigate to the *Mobile* section in the *Office Setup* page (***Admin > Office Setup***). All Mobile-related functions are managed in this section. Click on the History link to track Mobile configuration activity.
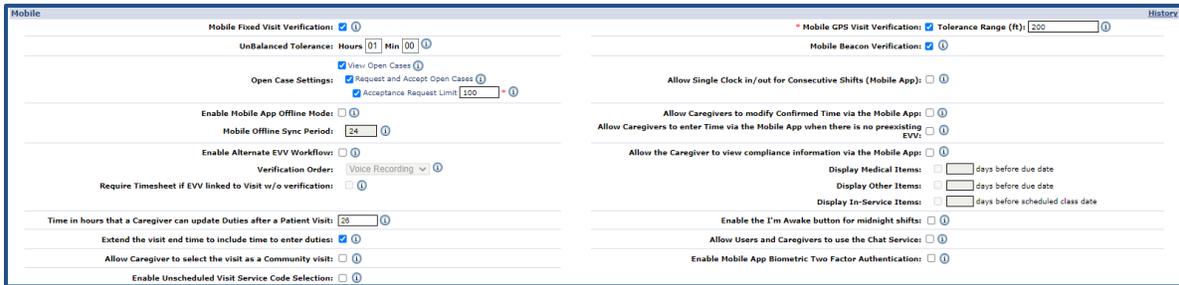
Office Setup: Mobile App Section

Mobile Verification and Tolerance Range

Agencies must authorize the use of the HHAX Mobile App before any Caregiver can connect and place EVVs from their mobile device. Complete the following steps to set up the connection.

Step	Action
1	Navigate to **Admin > Office Setup > Search Office** to locate the applicable Office.
2	The *Edit Office* page opens. In the *Mobile* section, select the **Mobile GPS Visit Verification** and **Mobile Fixed Visit Verification** checkboxes. **Mobile App Setup** - Select **Mobile Fixed Visit Verification** to use a FOB device with the Mobile App. - Select **Mobile GPS Visit Verification** to use the smartphone's GPS software to approximate the location of the Caregiver when sending an EVV. Setting a **Tolerance Range (ft)** or an area (measured in feet) surrounding the address of the visit is required for the EVV to successfully be placed. *Note: These fields may be activated independently of one another; therefore, Agencies may set up the system to accept GPS and FOB EVVs issued by the Mobile App, or just GPS or FOB EVVs.*
3	Click the **Save** button to register the selections.

Validate the Mobile ID

Once the Agency/Office has authorized the use of GPS and/or FOB EVVs through the Mobile App, the Caregiver's Mobile Profile must be linked to the system. Ensure that the Caregiver downloads and registers for the HHAX Mobile App on their device. Once registered, the Caregiver receives a 7-digit Caregiver Mobile ID number needed to link the two.

Complete the following steps to link the Caregiver.

Step	Action
1	Navigate to **Caregiver > Caregiver Search** and select a Caregiver.
2	Select the <u>Profile</u> link from the Index and click the *Edit* button.
3	In the *Demographics* section, enter the **Caregiver Mobile ID** (7-digit number provided by the Caregiver when registering in the Mobile App).
4	In the **Mobile ID Type** select *Clinical* or *Non-Clinical* (described in the table below). **Caregiver Profile: Mobile ID/Mobile ID Type** • Select **Clinical** to allow the Caregiver to access the Patient's clinical information on the Mobile App. • Select **Non-Clinical** to limit the Caregiver's access, not allowing access to the Patient's clinical information on the Mobile App.
5	Click the *Save* button to sync the Caregiver's Mobile App with the system.
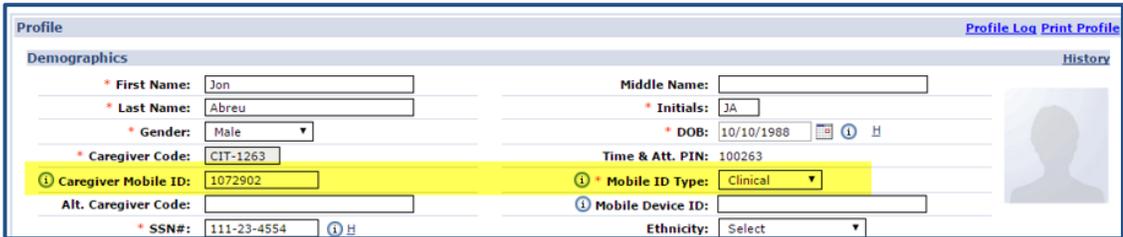
Associate Unlinked Mobile App Caregivers with their Caregiver Profile

In the process of registering for the HHAX Mobile App, some Caregivers may incorrectly enter demographic information resulting in failure to pair them with their Profile in the system in addition to not appearing in the *Mobile User Management* page. In these cases, Providers can search for unlinked Caregivers using specified criteria and initiate a pairing to update the Caregiver information.

Note: If an Agency has made a mistake when entering a Caregiver Profile, the Agency is responsible for correcting the Profile prior to linking to the Caregiver's Mobile App information.

To search for unlinked Caregivers, navigate to the *Mobile User Management* page (**Admin > Mobile User Management**). Click on the **Find Unlinked Mobile Users** button from the Search page.

Mobile User: Find Unlinked Mobile User

The *Find Unlinked Mobile User* window opens. Enter the **Caregiver Mobile ID**, required as denoted with a red asterisk, along with one or more identifying details (such as **First Name**, **Last Name**, Last 4 (digits of) **SSN**, **DOB**, **Email**, or **Phone Number**). Click *Search* to continue.

Find Unlinked Mobile User Window

The window expands showing a matching Mobile App profile at the bottom (if one is identified). From here, correct any mismatching values to ensure that both the **SSN** and **DOB** information matches, as seen in the image to the right. There must be values assigned to these fields (whether existing or changed) to save the changes. Click the **Save Changes** button to continue.

Navigate to the *Caregiver Profile* and re-enter the **Mobile ID** and *Save* for the system to link the system with the Mobile App.

Matching Caregiver Mobile Profile

Permissions for Search Unlinked Mobile User

By default, the Search Unlinked Mobile User permission is assigned for any role with the **Edit Mobile User Profiles** permission selected.

To assign permissions to a role, navigate to *Admin > User Management > Edit Roles*. Select *Admin* under the **Section** field and select applicable roles from the **Roles** dropdown. Select the **Search Unlinked Mobile User** checkbox and click *Save* to finalize.

Permission: Search Unlinked Mobile User

Patient Multi-Address

Multiple addresses can be entered for a Patient and be assigned to be used for GPS coordinates in the Patient Profile. In the address selection criteria includes *Primary Address* and *Allow GPS Address*, as described in the table below.

Address Type	Description
Primary	Unique for each Patient and required for the Patient Profile. The Primary Address is stored in the Patient Profile. At-least one Primary Address must be defined.
Allow GPS	(Optional) Can be selected in multiple address. This is the address used if GPS is the chosen modality to clock in/out (from this address).

Once saved, all entered Addresses appear under the *Address* section (as seen in the following image). The locator icon under the **Address Type(s)** column indicate that the address is GPS enabled. Under the **Notes** column, a note icon indicates if the address has a note attached.

Patient Profile: Multiple Addresses

On the Mobile App, the Patient Info tab shows multiple addresses if/as entered in the Patient Profile page (as illustrated in the image below).

Patient Multi-Address on Mobile App

Note: The Multiple Address feature in CMA 5.2.1 is not supported for Linked Patients and only displays the Primary Address.

The Mobile Device ID

Agencies may restrict access to the Mobile App by linking the Caregiver's **Mobile ID** to a **Mobile Device ID**. To link these two values, Agencies must enter the **Mobile Device ID** in in the Caregiver Profile (as illustrated in the image below).

Caregiver Profile: Mobile Device ID

Once a value is entered in this field, the system validates the **Mobile Device ID** each time the Caregiver logs in to the app. If the **Mobile Device ID** and **Caregiver Mobile ID** do not match, the system does not allow the Caregiver to log in.

*Note: The Mobile App displays the **Mobile Device ID** when Caregivers login.*

Limiting Mobile App Access by Device

Caregivers may access the Mobile App from any iPhone or Android with the installed application. Some Agencies would prefer to limit Caregiver Mobile App access to a specific device. In these cases, the device must be linked to the HHAX system.

When initially registering on the Mobile App, the Caregiver receives a **Caregiver Mobile ID** that must be provided to the Agency to link the Caregiver with the HHAeXchange system. In addition, the app also assigns a **Mobile Device ID** accessed via the Profile options (as illustrated in the images below).
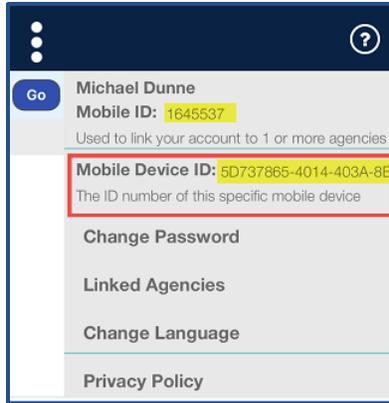
Mobile Device ID
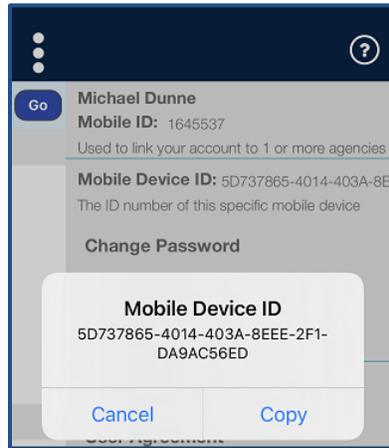
Mobile Device ID

*Note: In the example above, 5D737865-4014-403A-8E is entered in the **Mobile Device ID** field in the Caregiver's Profile.*

To limit Mobile App Access, navigate to the Caregiver's Profile and enter the **Mobile Device ID** <u>exactly</u> as displayed in the Mobile App (as seen in the image below). Once saved, the Caregiver only has access to HHAeXchange through the Mobile App on the corresponding device.
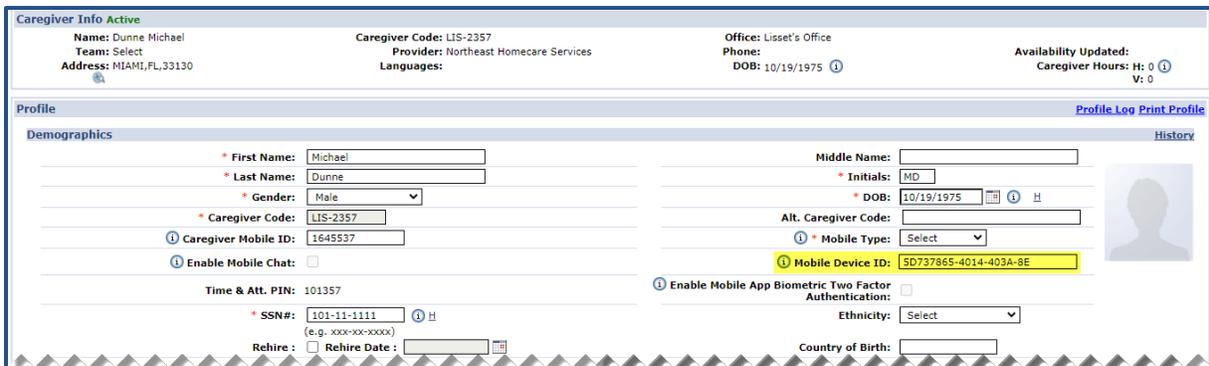
***Mobile Device ID* Field, Caregiver Profile Page**

If left blank, then the system does not validate the mobile device used to access the app.

Caregiver Availability

Agencies/Offices have the option to allow Caregivers to edit their availability preferences using the Mobile App. Follow the steps below to enable this functionality.

Step	Action
1	Navigate to **Caregiver > Caregiver Profile > Availability**
2	Select **Caregiver can set Availability options via Mobile App** checkbox. **Caregiver *Availability* Page**

Note: This is enabled on an individual basis. Repeat to enable per Caregiver.

Capture Patient Signature

When the **Capture Patient Signature** function is activated, Caregivers are prompted to provide a Patient signature when Clocking In and/or Out of a visit. Even if required, Patient signatures do not serve as a valid EVV compliance measure. Visits that require a **Patient Signature** are not sent to the Call Maintenance Exception page (when not provided). Additionally, the system cannot determine whether the signature is authentic.

It is up to the Agency to configure these settings, based on a Contract Level via the **Scheduling/Confirmation** tab in the **Contract Setup** page (*Admin > Contract Setup > Search Contract > Scheduling/Confirmation*) and with the **Reference Table Management** function (*Admin > Reference Table Management*).

Changes can be applied to both Internal and Linked (Payer) Contracts. Under the *Visit Confirmation Options* section, two checkboxes become available once '**At Clock In**' and/or '**At Clock Out**' checkboxes are selected under the **Capture Patient Signature on Mobile App** field titled **Allow Signature Skip** and **Require Timesheet if EVV linked to visit w/o Signature**, as seen in the instructions below.

Complete the following steps to activate and review **Patient Signatures**.

Step	Action
1	Navigate to the *Admin > Contract Setup > Search Contract*.
2	Select the *Scheduling/Confirmation* tab and navigate to the *Visit Confirmation Options* section.

3	On the **Capture Patient Signature on Mobile App** field, select *At Clock In* and/or *At Clock Out* checkboxes. From here, select options to **Allow Signature Skip** and **Require Timesheet if EVV linked to Visit w/o Signature** (as described in the bullets below the image).
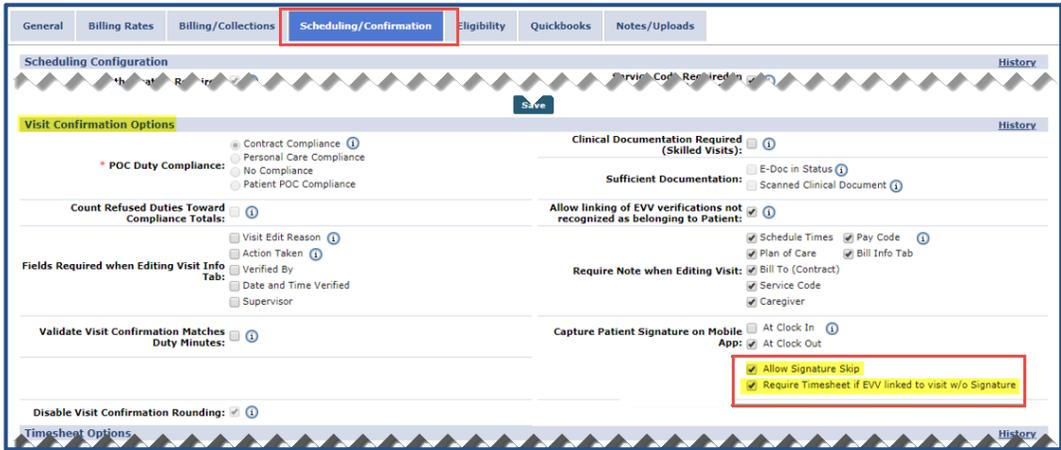	
	Capture Patient Signature
	
	• **Allow Signature Skip:** This option allows a Caregiver to skip the Patient Signature; however, the Caregiver must provide a **Reason** as to why the Patient could not sign at visit Clock-In and/or Clock-Out on their mobile device.
	
	    o *Note: If a signature is required on Clock-In/Clock-Out for an <u>existing contract</u>, the **Allow Signature Skip** checkbox is selected by default and Caregivers are required to provide a **Skip Reason**. If the Agency unchecks the **Allow Signature Skip** checkbox and requires a signature, then the Caregiver cannot move forward on the mobile app <u>until a Signature is provided</u>.*
	
	• **Require Timesheet if EVV linked to Visit w/o Signature:** In addition to selecting the **Allow Signature Skip** checkbox, selecting this option requires a timesheet for the visit if a Patient refuses to sign at the time of Clock In and/or Clock Out. When the Signature is skipped, the **Timesheet Required** flag is automatically selected on the Visit Details page and the Caregiver receives a notification from the respective Agency.
	
	    o *Note: If **Timesheet Required** is already selected on the Contract Setup page, then the Caregiver does not receive notice.*

4	Click the **Save** button to register the selections.

Reference Table Management

To create or edit Skip Signature reasons, go to the Reference Table Management (*Admin > Reference Table Management*) and select the *Patient Signature Required Skip Reason* in the **Reference Table** field, under the Visit category. Active options appear on the Caregiver's mobile device.

Although Skip Reasons are Agency-specific, there are two standard default options for all Agencies: **Patient Refused** and **Patient Unable to Sign**.

Reference Table: Patient Signature Reqired Skip Reasons

To add a Skip Reason, click the *Add* button on the Reference Table page to open the Patient Signature Required Skip Reason window. Enter a **Reason** title (required) and a **Reason Description** in the open text field. Ensure the **Status** is set to *Active*. Click *Save* to add to the options.

Create Skip Reason

Caregiver Note

When a Patient Signature is required and the Patient refuses or cannot sign, a Caregiver Note is created and stored in the Caregiver Notes page (*Caregiver > Notes*), as seen in the image below. The note provides the visit details and informs the Caregiver that a Timesheet is required. This message also displays on the Mobile App in the *Message* section.

Caregiver Notes – Skipped Signature Note

*Note: If **Timesheet Required** is selected at the Contract level, the Caregiver does not receive the alert.*

Call Maintenance, Link-Unlink Call In/Out Related Changes

Regardless of whether the call appears on the Call Dashboard, if the Caregiver has skipped the signature, a **Note** is generated and a **Timesheet Required** flag is set on the *Visit Details* page. The system can generate a **Patient Signature** report (*Report > Visit > Visit > Patient Signature*) capturing reasons when a required signature is skipped.

Patient Signature Report

Mobile Application Recipient

The Mobile App communication functionality allows Caregivers and system users to communicate via HHAX's internal correspondence tools. To use this functionality, Agencies must create *Mobile Application Recipient Groups* (group of message recipients) via the **Reference Table Management** function.

Complete the steps below to *add* or *edit* a Mobile Application Recipient Group.

Step	Action
1	Navigate to *Admin > Reference Table Management*.
2	From the **Reference Table** dropdown, select *Mobile Application Recipient* (under the **General** category). Click the **Add** button to create a new Group. Click on the Group Name (link) to edit an existing Group. **Reference Table: Mobile Application Recipient**
3	The **Mobile Application Recipient Group** window opens. Complete or edit the required fields (described under the image). **New Mobile Application Recipient Value** • **Group Name:** Name the Group intended to receive the Mobile App message (such as Coordinator, Administrator, etc.). • **Group Description:** Enter a brief description of the Group (such as Patient Coordinators). • **Recipients:** Select the recipients of the Mobile App messages from the multi-select dropdown (populated with system users). • **Status: Active** (make available) or **Inactive** (deactivate the Group)

Step	Action
4	Click the *Save* button to finalize. Moving forward, Caregivers select the applicable Mobile Application Recipient Group to send a message from the Mobile App.

Reviewing Mobile App Messages

Mobile App messages can be reviewed on the *Notifications* tab on the *Home* page or on the **Note** page of the Caregiver Profile (as illustrated in the images below).
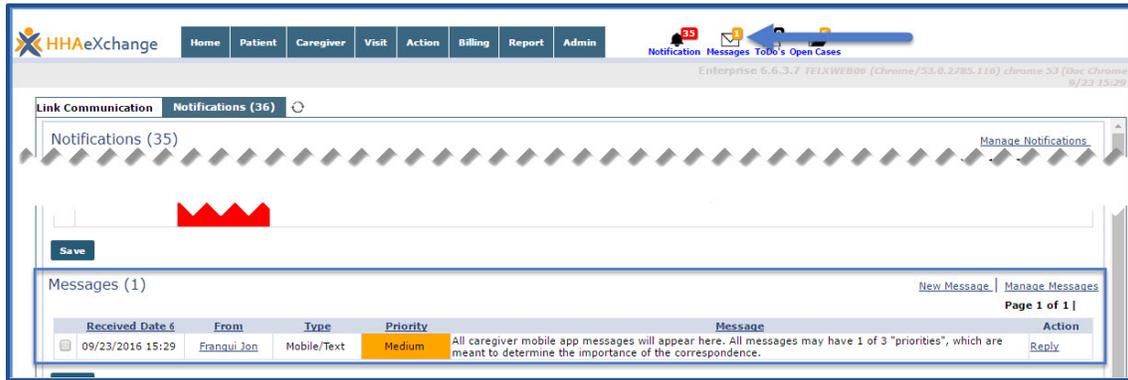
Mobile App Message, Home Module
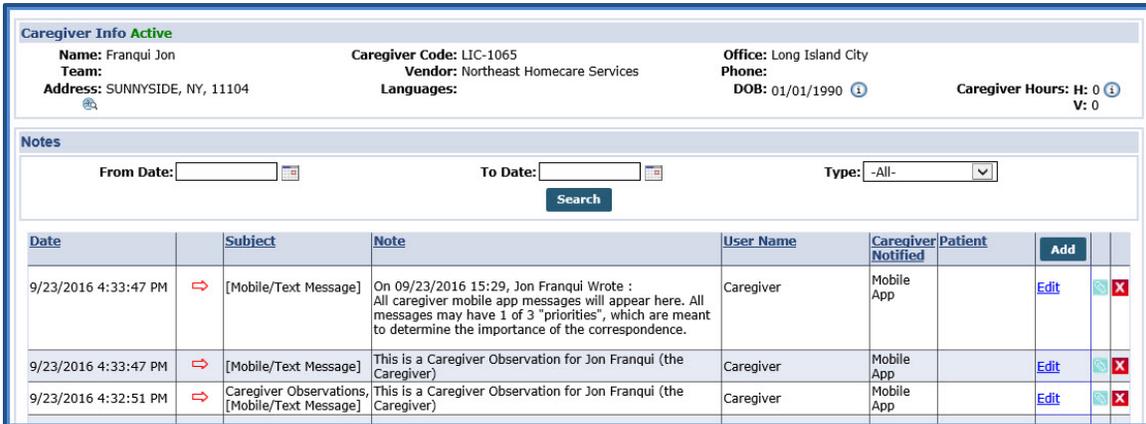
Mobile App Message, Notes Page

Agency Management

Call Maintenance

Issues with GPS-based EVV placements are routed to the **Call Maintenance** page. The following are three status issues regarding GPS confirmation. Any GPS EVV routed to Call Maintenance with any of the below-listed status cannot be linked to a visit.

The only course of action with these issues is to *reject* the EVV.

Status	Description (Issue occurs…)
GPS Signal not Detected	when a Caregiver places a GPS EVV with the location services turned off on their device. This blocks the system from verifying if the Caregiver is within range of the Patient's address.
GPS Signal Out of Range	If a Caregiver attempts to place a GPS EVV outside the designated **Tolerance Range**.
Unscheduled–Patient Not Selected	When a GPS-based EVV is placed and cannot be connected to a Patient.

Aside from the above-listed status, other GPS-based EVV (such as **No Schedule on Calendar** or **Potential In/Out Mistake**) may end up on the **Call Maintenance** page. To distinguish GPS issues on the **Call Maintenance** page, a GPS icon displays to the left of the status (as illustrated in the image below).

The GPS Icon on Call Maintenance

Caregiver Visit Notes

When a Caregiver enters a visit note from the Visit Detail page of the Mobile App (Visit Text Note, Visit Voice Note, or Visit Image Note), a Visit Note icon appears on the Calendar for that visit (as seen on the image below).
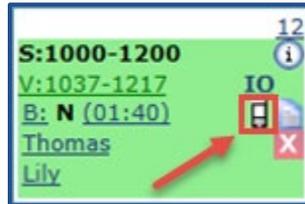
Calendar: Visit Note icon

The Visit Note can be viewed in at the bottom of the *Visit Info Tab* (**Mobile App Multimedia** section) or at the bottom of the Patient's *General* page (**Notes** section), as illustrated in the images below.

Visit Info Tab, *Mobile App Multimedia* Section

Patient > General Page: Notes section

Signature Report

Although the **Patient Signature** is not a valid EVV compliance measure, it may be used as an auditing tool. Running the **Patient Signature** report allows an Agency to ensure Patients are providing signatures when required. Moreover, the report provides Patient signatures to be verified for consistency measures.

To run and review a **Patient Signature** report, navigate to *Report > Visit > Visit > Patient Signature*:

HHAeXchange			**Patient Signature**				Page 1 of 1
							Report Date: 03/23/2016 04:29 PM

From Date: 3/1/2016	**To Date:** 3/31/2016	**Contract:** All	
Patient: All	**Caregiver:** All		
Coordinator: All	**Discipline:** All	**Signature Status:** All	
Caregiver Team: All	**Caregiver Location:** All	**Caregiver Branch:** All	
Patient Team: All	**Patient Location:** All	**Patient Branch:** All	

Visit Date	Patient	Contract	Caregiver	Sched / Conf	EVV Method	Clock In Signature	Clock Out Signature
3/23/2016	Soprano Tony (900028)	Heaven's Care	Perez G (1060)	1245-1300 1245-1254	GPS/GPS		N/A
3/15/2016	Fisher Max (900057)	Heaven's Care	Perez Gloria (1048)	1100-1200 1113-1209	FOB/GPS		
3/21/2016	Soprano Tony (900028)	Heaven's Care	Perez G (1060)	1000-1015 1007-1008	GPS/GPS		N/A
3/21/2016	Fisher Max (900057)	Amazing Health	Perez Gloria (1048)	1045-1100 1045-1103	FOB/FOB		
3/23/2016	Fisher Max (900057)	Amazing Health	Perez Gloria (1048)	1245-1300 1240-1247	GPS/GPS		
3/23/2016	Fisher Max (900057)	Amazing Health	Perez Gloria (1048)	1300-1315 1253-1256	FOB/FOB		

Patient Signature Report

In addition to the Patient signatures, the report provides Visit Date, Patient, Contract, Caregiver, and Hours (Scheduled/Confirmed).

Note: If either the **Clock In Signature** *or* **Clock Out Signature** *fields contains an* **N/A** *value indicates that a signature is not required.*

Case Broadcasting via Mobile App

The **Mobile App Case Broadcasting** functionality enables Coordinators to set Broadcasts of a single visit (Single shift) or a Master Week (Permanent shift) to their Agency's Caregivers. Caregivers see these Broadcasts on their Mobile App where they can view and press the checkmark (express interest) or the X (uninterested) to open work shifts, as seen in the image below.
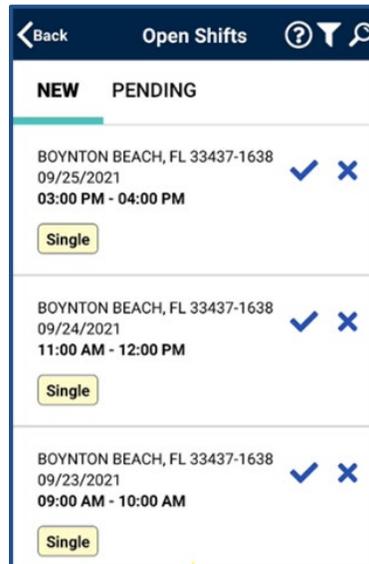
Broadcasted Shifts on Mobile App

- When *__interested__* in an open shift (✓), the request is logged in Enterprise and sent to the Broadcast Dashboard for further assignment by the Coordinator.
- When *__uninterested__* in an open shift (X), the open shift no longer displays on the Caregiver's Mobile app and Enterprise application.

Coordinators sort through past Broadcasts and Caregiver requests, and either revoke or rebroadcast a past broadcast; *__or__* assigns or rejects the Caregiver's requests.

IMPORTANT
The Caregiver must be logged in to the Mobile App to review Case Broadcasts in the Open Shifts screen.

Broadcast Dashboard

The **Broadcast Dashboard** page is where a Coordinator reconciles all existing requests, sorted by visit. This page loads based on a set of search filters (such as the Visit Search page).

Each broadcasted visit lists every Caregiver who has requested visits. From this page, a Coordinator can:

1. **Assign a Request** – Assigns the shift to a Caregiver and all other requests for the shift are rejected; OR

2. **Reject the Request** – Provides a **Rejection Reason** which is sent to the rejected Caregiver(s).

Broadcast buttons are available in various locations throughout the system allowing users to perform a **Quick Broadcast** (sent to all Caregivers) or **Matching Caregivers** (sent to select/applicable Caregivers).

Reference Table Management

In the *Reference Table Management* functionality, use the **Broadcast Reject Reason** dropdown field to create and manage the Broadcast Rejection Reason on open shifts.
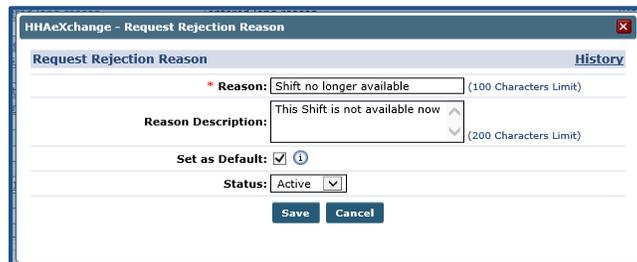
Creating a Request Rejection Reason

The **Reject Reason** is required and at least one reason must be selected as default. If only one reason exists, it is automatically selected. Once a default reason is set, this reason is the automatic response sent from the system for rejected cases.

If a case has been assigned, then all remaining requests for that visit are automatically rejected. If a Coordinator chooses to reject each request individually, other reasons may be selected (as created in the Reference Table). The Reference Table search page indicates which rejection reason is the default indicating "Yes" under the Default column, as illustrated in the following image.

Reference Table Management: Broadcast Reject Reason

Office Setup

Navigate to **Admin > Office Setup** to access the Mobile settings and select the applicable fields in the **Open Case Settings** section, as illustrated in the image.
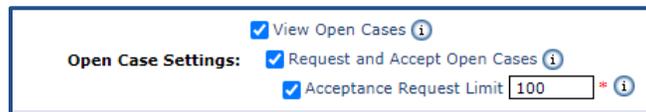
Office Setup: Open Case Settings

These settings determine the configuration for all new Caregivers, who have a matching set of options on the Caregiver level. The following table provides a description for these settings.

Field	Description (If selected…)
View Open Cases	Caregivers can see the section for **Open Cases** on their Caregiver Mobile App. *Note: Viewing open cases shows shift details to Caregivers.* **Request and Accept Open Cases** *must be selected to submit requests for these visits.*
Request and Accept Open Cases	Caregivers can request cases marked as **Open** via their Mobile App. Requesting and accepting **Open Cases** allows certain Caregivers to submit requests for broadcasted shifts which are available to them. *Note: If the* **View Open Cases** *is not enabled, then this option is not available.*
Acceptance: Request Limit	Once selected, this field requires a numeric value between 1 and 9999 representing the number of pending requests a Caregiver can have at one time. Cancelled, rejected, and approved requests do not count against this number. If selected, Caregivers have a limit on how many Open Requests they can place with the Office before the function is disabled. The **Request and Accept Open Cases** must be selected for this option to be available.

Caregiver Setup

To setup the Caregiver Mobile App in the system, navigate to **Caregiver > Availability** page, as illustrated in the image below. The Caregiver-level fields are populated based on the default settings in the Office Setup. These settings are adopted for any new Caregivers created in the system.

Caregiver Availability page: Mobile App Settings

*Note: Changes at the Office Setup does not impact existing Caregiver-level settings. Enabling the **Set Availability** field allows the Caregiver to set their availability via their Mobile App.*

Broadcasting

Broadcasting functions operate similar for Single Shifts and Master Weeks, although opportunity to Broadcast vary slightly. While Single Shifts have the broadcasting functionality available throughout the system, a Master Week has the Broadcasting functionality only on the editing page.

Selecting the **Broadcasting** icon (as illustrated on top, right) provides the options to either **Quick Broadcast** or select **Matching Caregivers**. (as illustrated on the bottom-right).
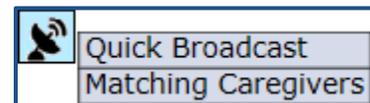
The following conditions must be met for the Broadcast icon to be available:

For Single Shifts:

- User has the "Broadcast Open Case" permission enabled
- Visit date must be either the Current Date or Future Date only

- Visit is not Confirmed

- Visit is not Billed

For Master Week:

- User has the "Broadcast Open Case" permission enabled

- The Master Week End date is not a past date. Either the Master Week's End Date is Blank, with Current or Future Date only.

If attempting to create a Broadcast for a previously broadcasted shift (duplicate), the system alerts that the same shift has already been created by another user. In this case, refresh the page and create another broadcast for a different shift.

Master Week Broadcasting

Users can Broadcast a Master Week by way of the edit (Hours) link (as indicated on the following image).
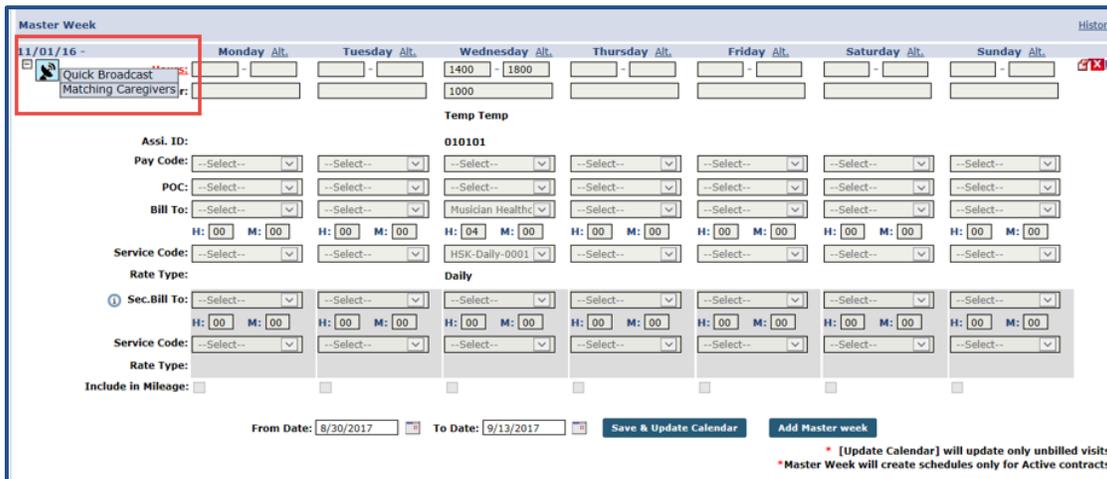
Master Week Broadcasting

When selecting the **Quick Broadcast** option, the *Quick Broadcast* window opens prompting User to create a note (such as Open Shift information) and click the **Broadcast** button to broadcast the visit.
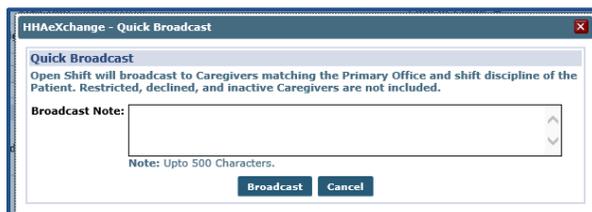
Quick Broadcast Window

Once the Broadcast is issued, the **Quick** icon turns green indicating that the Broadcast is live. The Broadcast is issued to Caregivers who meet the following criteria:

- Enabled to View Open Cases

- Matches the Patient's Primary Office

- Matches all Master Week disciplines (such as HHA and/or PCA). Only Caregivers having required disciplines selected on their Caregiver Profile can see this Broadcast.

- Are not listed as *Restricted* (shift Contract), *Declined* (shift Patient), or has an *Inactive* profile.

Note: Caregivers added or updated to match criteria <u>after</u> broadcast still see matching cases.

If **Matching Caregivers** is selected, the *Matching Caregivers* window populates as illustrated in the image below. From here, users can select scheduling requirements or preferences as per available fields (such as **Language**, **Gender** or **Location**). The criteria listed above applies for this option as well.

The **Availability Preference** field (denoted with a red asterisk) is required for Broadcasting with this option. The default selection is *Preferred*, however, other options such as *Might Work*, or *Do not factor in availability* may be selected.

Once complete, click the **Broadcast** button.

Matching Caregivers Window

*Note: The system filters any selected criteria (such as **Team, Branch, Miles**) to match Caregiver database.*

Once the Broadcast is issued, the **Matching** icon turns green indicating that the Broadcast is live.

Options After Broadcast

The green **Quick** and **Matching** buttons are selectable once a Broadcast has been issued providing the user with options as illustrated below and described in the table under the image.

Option	Description (If selected…)
Edit Broadcast	Allows the Coordinator to edit the Broadcast using the Matching Caregivers window.
Revoke Broadcast	Removes the Broadcast from all Mobile Apps, whether Caregivers have seen or requested the case. The Coordinator is prompted to confirm the revocation.
Review Requests	Opens the **Broadcast Dashboard** to the Requests tab prompting a search generating only the requests for this Master Week.
Received Broadcast	The **Caregivers That Received This Broadcast** popup window lists all Caregivers who gave the shift a "thumbs up" to request the case (shift) on their Mobile App. Selecting the **Caregiver's Name** (hyperlink) opens the Caregiver's Profile. The Status column indicates the Action taken by the Caregiver as follows: • **No Action** – has not interacted with the Broadcast; no request submitted.
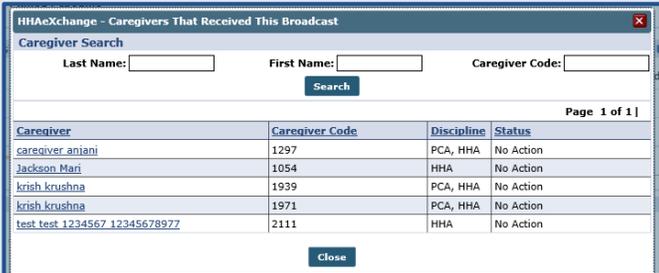
	• **Rejected** - has requested the shift or Master Week but their request has been rejected. • **Request Pending** - has requested the shift or Master Week and no action has been taken.

Note: Once a Request has been assigned, the broadcast closes and the menu is no longer available.

Other Notes Regarding Master Week Broadcast

Master Week with Mixed Disciplines (Skilled and Non-Skilled Discipline Types)

The system does not allow the Broadcast of a Master Week with a combination of Skilled and Non-Skilled disciplines. Broadcasts only reach Caregivers with the matching criteria to include the Employment Type disciplines in their profile as well as those disciplines indicated on the Patient's authorization.

Master Week > Change Caregiver

Except for **Temp Caregiver (1000)**, the system does not allow users to manually change a Caregiver on any shift once a successful Master Week Broadcast has been created. To correct this, the user would have to **Revoke the Broadcast** and re-create to change Caregiver details.

Master Week > Alternate Shift

System does not allow users to create a Master Week Broadcast with an Alternate Shift.

Single Shift Broadcasting

Single Shift Broadcasting options are found in the *Visit Schedule tab* and the *Visit Search Page*. As with the Master Week, the Broadcast icon appears in these pages allowing users to access the Broadcast functionality. Refer to the previous sections, **Broadcasting** and **Options after Broadcast** to review.

Visit Info Schedule tab Location

The Broadcasting icon is available under the Caregiver field in the Visit Schedule tab, as illustrated in the following image. The icon appears in blue if a Broadcast has not been issued for this visit.

Visit Info: Schedule tab

Visit Search Page Location

On the *Visit Search* page, view visits and if a Broadcast has been issued; Broadcast icons denoted in green indicate an issued Broadcast for the visit. Hovering over the icon indicates whether the Broadcast is **Quick** or **Matching Caregivers**.

Visit Search Page: Viewing Broadcasts

Other Notes Regarding Single Shift Broadcast

Visits > Change Caregiver

Once a successful Open Case Broadcast has been created, a Caregiver Change causes the system to save the specific Caregiver on the schedule and revoke the Broadcast. If the change is confirmed, all Caregivers who requested the shift are declined.

If the change is for a Caregiver who is currently Pending Request the change is saved, the confirmation message is sent via the Case Acceptance process. If the newly scheduled Caregiver has requested for Broadcast, then the system accepts the Broadcast and all other Caregiver requests are rejected with Default Rejection Reason.

Note: In this case, Users can change the Caregiver to **Temp Caregiver (1000)** *without having to confirm or revoke Broadcast.*

Broadcast Dashboard

Navigate to ***Action > Broadcast Dashboard*** to access the dashboard. The Broadcast Dashboard is divided in two views according to selected radio button (either *Single Shifts* or *Master Week*).

Single Shifts View

The image below illustrates a **Single Shift** view, providing search filters associated with single shifts. The following criteria apply to the results on this dashboard:

- Broadcast is not Revoked
- Visit Date is Current or Future Date
- Visit is not Confirmed
- Visit is not Billed

Broadcast Dashboard: Single Shift View

Above the results grid, the system summarizes and provides the **Total (Number) of Open Shifts** and the **Total (Number) of Shift Requests**. Each line item contains information as described in the following table (one row, per Patient, per Open Shift).

Column	Description
Expand/Collapse	Click the + / - box to expand or collapse shift details.
Date of Broadcast	The date of the shift.

Column	Description
Patient	Patient Name. Click hyperlink to access a summary popup and to navigate to the Patient Calendar.
Coordinator	Patient Coordinator
Visit	Visit scheduled time. Click hyperlink to access the Visit Edit details popup.
Discipline	Discipline of the Service Code scheduled.
Contract	Primary Contract for the visit.
Address	Patient's Address. Click hyperlink to open the popup and navigate to Google Maps for this location.
Phone	Patient's Home Phone. Click on the hyperlink to show additional phone numbers for the Patient to include Emergency Contact.
Requests	Hover over the Requests hyperlink to access Patient Preferences to include Primary and Secondary Language, Preferred Gender, and other preferences. Click on the hyperlink to access the Caregiver's Preferences.
Status	Indicates the Status of the Open Shift: • **Requested:** At least one Caregiver has requested the shift. • **No Requests:** No Caregiver has requested the shift.

If a Caregiver has requested an Open Shift, the records are illustrated underneath the Open Shift. Click the **+ / -** box to expand/collapse the details. Each line item is described in the table underneath the image.

Caregiver Requested Open Shift

Column	Description
Expand/Collapse	Click the + / - box to expand or collapse shift details.
Caregiver	Name of the Caregiver and Code (in parentheses) requesting the shift. Click hyperlink to access the Caregiver's Profile popup.
Requested	The Date and Time the Caregiver submitted the request.

Column	Description
Employment Type	Caregiver disciplines as noted in the system.
Hours	The Caregiver's hours for the Payroll Week of the selected date. The system uses the Weekly Hours which are shown on the Caregiver's Calendar. This value varies depending on the date of the Open Shift.
Address	Caregiver's Address. Click hyperlink to open the popup and navigate to Google Maps for this location.
Phone	Caregiver's Home Phone. Click on the hyperlink to show additional phone numbers for the Caregiver to include Emergency Contact.
Preferences	Hover over the Preferences hyperlink to access Caregiver Preferences to include Languages and other preferences. Click on the hyperlink to access the Caregiver's Preferences.
Assign / Reject	Each row has an **Assign** (green) and **Reject** (red) button for Coordinators to assign Open Shifts. To assign or reject a shift, users must have *Edit Schedule* permissions.

Note: These line descriptions also apply to Master Weeks view.

Assigning a Shift Request

When selecting **ASSIGN**, the system attempts to match all Broadcast criteria with the Caregivers who have requested the shift. If a Caregiver Request does not match the Broadcast, the system generates a message informing the user of the mismatch. On the confirmation:

- Select the *OK* (button) to open the *Edit Visit* window.
- Select the *Cancel* (button) and the system closes the confirmation window and returns user to the *Broadcast Dashboard* with no action taken.

The Visit window opens to the *Visit Schedule* tab with the selected Caregiver. The Broadcast icon appears unavailable and the schedule **Start Time**, **End Time**, and **Caregiver** fields are un-editable. Click the *Save* button to proceed.

If the Caregiver is scheduled successfully (***Assigned***), then the system sends a confirmation to the Caregiver via the Mobile App with the visit details (Date, Times, Address, etc.). The system then rejects all other requests with the Default Reject Reason and returns user to the Shift Request page. The Accept shift is removed from the Open Shifts.

Note: The system does not save if the Caregiver cannot be scheduled or if Cancel is selected which routes the user back to the Shift Request page.

Rejecting a Shift Request

When selecting REJECT, the selected row is removed, and the Rejection Reason window opens. If all rows are rejected, then the Caregiver Requests grid is removed and the Status switches to "No Requests."

Once a Patient visit begins, a rejection message is automatically issued to all Caregivers who have requested this visit, with the default Rejection Reason (such as "Shift no longer available"), as illustrated in the image below.

Rejection Reason window

Master Weeks View

The image below illustrates a **Master Weeks** view, providing search filters associated with Master Week shifts. The following criteria apply to the results on this dashboard:

- Broadcast is not Revoked

- End Date of Master week is either blank, Current Date or Future Date.

Broadcast Dashboard: Master Weeks View

Above the results grid, the system summarizes and provides the **Total (Number) of Open Master Weeks** and the **Total (Number) of Master Week Requests**.

Each line item contains information as described in the following table.

Column	Description
Date	The Master Week date range.
Patient	Patient Name. Click hyperlink to access a summary popup and to navigate to the Patient Calendar.
Coordinator	Patient Coordinator
Visit	Scheduled Master Week Visits. Hovering over the details provides a quick-glance view (such as **Pay Code**, **POC**, **Primary Bill To** and **Service Code**).
Discipline	Disciplines based on the Service Code scheduled on all Master Week shifts.
Primary Payer	Primary Payer for the visit.
Contract	Primary Contract for the visit.
Address	Patient's Address. Click hyperlink to open the popup and navigate to Google Maps for this location.

Column	Description
Phone	Patient's Home Phone. Click on the hyperlink to show additional phone numbers for the Patient to include Emergency Contact.
Requests	Hover over the Requests hyperlink to access Patient Preferences to include Primary and Secondary Language, Preferred Gender, and other preferences. Click on the hyperlink to access the Caregiver's Preferences.
Status	Indicates the Status of the Open Master Week: • **Requested:** At least one Caregiver has requested the shift. • **No Requests:** No Caregiver has requested the shift.

Caregivers who have made a Master Week request are listed underneath the Open Master Week, as illustrated in the image below. Click the **+ / -** box to expand/collapse the details. Refer to the Caregiver Single Shifts View table for the descriptions to each line item.

Caregiver Requested Open Master Week

*Note: The Caregiver's hours based on the current Master Week schedule. The system uses the existing Master Week Hours on the Caregiver's Master Week Report (navigate **Caregiver Profile > Calendar > Caregiver Master Week** link to view).*

Assigning a Master Week Request

When selecting **ASSIGN**, the system attempts to match all Broadcast criteria with the list of Caregivers who requested the Master Week shift. If a Caregiver Request does not match the Broadcast, the system generates a message informing the user of the mismatch. On the confirmation:

- Select the *OK* (button) to open the *Edit Master Week* window.
- Select the *Cancel* (button) and the system closes the confirmation window and returns user to the *Broadcast Dashboard* with no action taken.

The *Edit Master Week* window opens with the selected Caregiver. The Broadcast icon becomes unavailable and the schedule **Start Time**, **End Time**, **Caregiver**, the **Masterweek From** and **To Dates** as well as the *Copy Masterweek* link and *Hours* link are un-editable. Click the ***Save*** button to proceed.

If the Caregiver is scheduled successfully (***Assigned***), then the system applies a rollover of the same Master Week (based on the settings of the Master Week). The system sends a confirmation to the Caregiver via the Mobile App with the details (Date, Times, Address, etc.). The system then rejects all other requests with the Default Reject Reason and returns user to the Shift Request page. The Accept shift is removed from the Master Weeks Open Shifts.

If a Caregiver's Master Week Request is approved during a current Master Week shift, then the Caregiver is assigned to begin the assigned shift at the beginning of the next whole shift; partial shifts are never assigned.

*Note: The system does not save if the Caregiver cannot be scheduled or if **Cancel** is selected which routes the user back to the Shift Request page.*

Rejecting a Master Week Request

When selecting **REJECT**, the selected row is removed, and the Rejection Reason window opens. If all rows are rejected, then the Caregiver Requests grid is removed and the Status switches to "No Requests."

Once a Master Week has ended, a rejection message is automatically issued to all Caregivers who have requested the Master Week, with the default Rejection Reason (such as "Shift no longer available").

Case Broadcasting – Reporting Tool Data Source

Case Broadcasting data is captured via the Reporting Tool using the "Case Broadcast" data source file. The following are some examples of what information can be retrieved:

- Date Ranges (Sent, Received, Assigned Cases)
- Number of Broadcasts (Sent, Received, Assigned Cases)
- Number of Shifts assigned per Broadcast (Assigned, Rejected)

Patient Phone Number Descriptions

Patient phone number descriptions corresponding to the descriptions entered in the **Phone 2** and **Phone 3** fields in the Patient Profile in the HHAX system are seen on the Mobile app (as illustrated in the top image). The second image illustrates the labels as seen in the Mobile app.


Patient Profile: Address Section

Phone Number Description Labels

Mobile App Offline Mode

This feature allows Caregivers to use the Mobile App when there is no internet connectivity; later to synchronize when connectivity is restored.

To manage the feature, navigate to **Admin > Office Setup > Search Office**. In the *Mobile* section, select the **Enable Mobile App Offline Mode** checkbox to enable the function for the selected Office. To set the sync period, specify the number of hours in the **Mobile Offline Sync Period** field to accept the sync period (range between 24-120 hours).
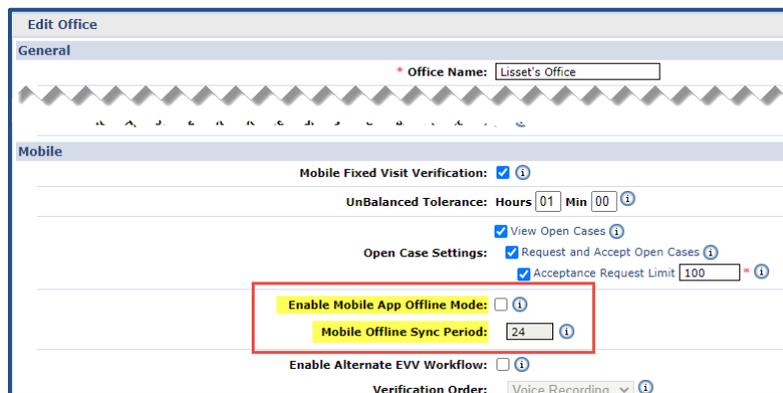
Mobile App Offline Mode Settings

Note: By default, the ***Enable Mobile App Offline Mode*** *field is unselected. The default sync period is set to 24 hours.*

The **Mobile Offline Sync Period** is used to determine how much Patient and visit data is transferred to the mobile device when the Caregiver logs in when online.

- If the Office is servicing an area with relatively stable Internet via Wi-fi or cell, then a lower sync period is recommended.
- If the Office is located in a rural area with unstable Internet, then a higher sync period is recommended.

For example, if the **Mobile Offline Sync Period** is set to *48* hours, then two full days of visit data are transferred to the Caregiver's device every time they log in when online. If they go offline immediately after, then they can perform visits for 2 full days before having to go back online again for additional visits.

With this feature enabled at the Office level, Caregivers can Clock IN/OUT successfully while offline. Once the internet connectivity is restored, the Mobile App synchronizes with the HHAX system and new and modified visit information is exchanged between the HHAeXchange System and the Caregiver Mobile App according to the sync period.

Caregiver Mobile App

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

- Logging In
- Switching Agencies
- Changing Languages

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

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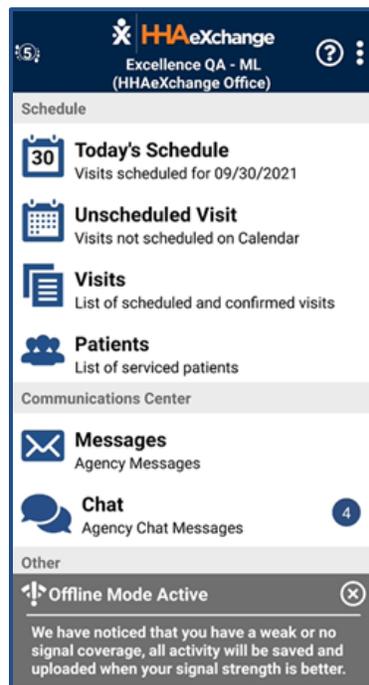
Mobile App Offline Mode Active

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

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

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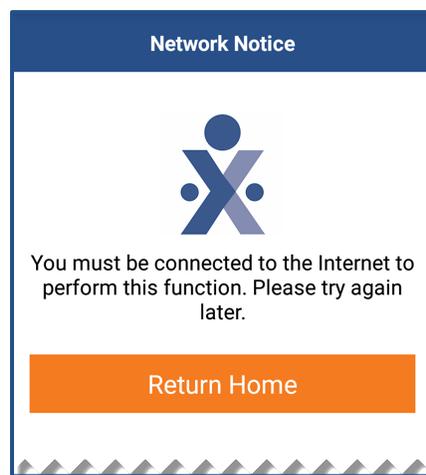
Mobile App Network Notice

Functionality NOT Supported in Offline Mode:

- My Availability
- Open shift
- Messages
- Patients
- Sign up
- Forgot Password

- Change Password
- Change Language
- Change Agencies
- Notes
- Care Insights
- Caregiver Time Edit Request

Caveats

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

1. When online, visits created on the same day by the Agency are almost immediately available to the Mobile App when the Caregiver goes to **Today's Schedule**. In Offline Mode, this behavior changes and new and modified visit data is not available until synchronization occurs (i.e., when the user *logs in*, *switches agencies*, *switches languages* or clicks on *Unscheduled Visit*, *Visits* or *Patients*).

2. If the Caregiver is in **Today's Schedule** when online and then goes offline, then the Caregiver is redirected back to the home page where the **Offline Mode Active** message appears. Note that once offline, the Caregiver may start a visit which is then altered by the Agency. In this case, any reconciliation of that visit must be performed manually by the Agency after the Caregiver goes back online and synchronization takes place.

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

4. When an Agency has the **Enable Offline Mode** selected, if the Caregiver performs a Clock In through an **Unscheduled Visit**, then the Clock Out must be performed using **Today's Schedule**.

Note: To prevent disruption to the Caregiver synchronization process, it is recommended that Mobile Offline Support for your Office be enabled outside of regular business hours.

Offline Authentication

Because credentials cannot be authenticated with the HHAeXchange system when offline, the Mobile app securely stores the last known credentials on the mobile device for the Caregiver to log in when in Offline Mode. The user is allowed up to 3 attempts to login before they are prompted to wait 3 minutes to retry.

Mobile User Management

The **Mobile User Management** function (***Admin > Mobile User Management***) facilitates the search and management of Mobile App Users. This function allows users to update Mobile User information to include password reset without having to contact HHAX Support.

Note: Applying updates via this function does not affect any fields in the HHAX Caregiver Profile.

The *Mobile User Management* page is comprised of two sections: **Search** and **Search Results**, as illustrated in the following image. On the Search Results, each record contains Mobile User information (such as the *Office Name*, *Caregiver Name*, *Mobile ID*, *Email Address*, and *SSN*). The right-most columns include an Edit (link) to update Mobile User information and Reset to reset the user's password.

Mobile User Management

A Mobile User must have an *Active* **Status** for the Edit and Reset links to be available. In addition, a user must have permissions enabled for **Edit Mobile User Profile** and **Reset Mobile Passwords**. Refer to the Permissions section below for further details.

Upon clicking on Reset, an email or text message is sent to the mobile user prompting for a Password Reset.

Editing information in a Mobile User Profile is permission-based. In addition, Caregivers linked to multiple Agencies cannot be edited in the system, as illustrated in the image below. In this case, contact the HHAX Support Team for further assistance.
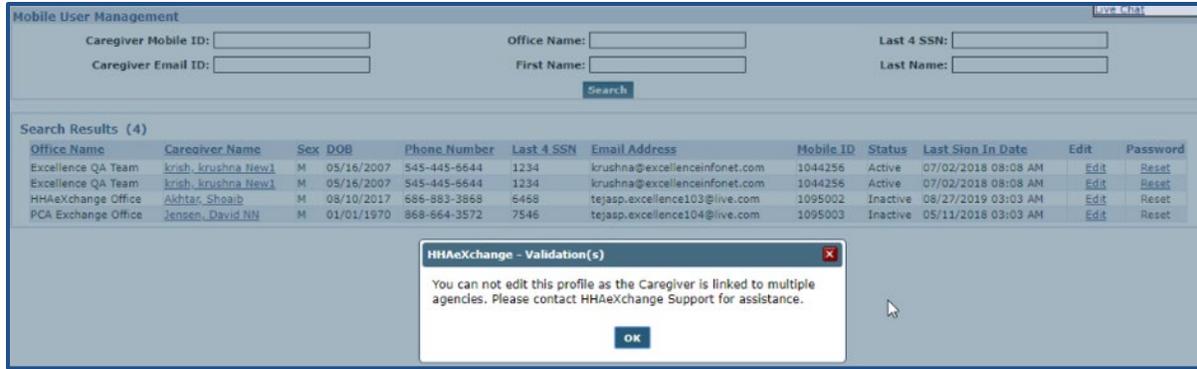
Mobile User Management: Edit Validation

DISCLAIMER

Editing Mobile User Information via the Mobile User Management function ***inactivates*** the User's Mobile/Portal ID (in the Mobile App). The **Mobile/Portal ID** must be changed to *Active* thereafter in the Caregiver Profile page.

Mobile User Management - History

When editing a Caregiver's information via the Mobile User Management function, a **History** link is available on the *Edit Caregiver Profile Information* window (as seen in the following image) to view a history of any Mobile User Management function for the Caregiver.

Edit Caregiver Profile Information Window – History Link

When clicking on the **History** link, the system prompts for a **Field Name** as well as a **From/To Date** range (as seen in the image below). Based on the selected **Field Name**, the Search Results show a Caregiver Mobile Management change log providing information such as the User who made the edit, the date, the Caregiver Name and the old and new values.

Mobile User Management: View History

Permissions for Mobile User Management

Role permissions must be enabled for users for this function. To grant permission to a role, navigate to *Admin > User Management > Edit Roles*.

Select *Admin* from the **Section** field dropdown and the applicable role(s) from the **Roles** dropdown.

Scroll to Mobile User Management and select *Mobile User Management* for the respective role(s).

- Select *Edit Mobile User Profiles* to allow a role to view and edit profiles.

- Select *Reset Mobile Password* to allow the role to reset a Mobile User's passwords.

Mobile User Management Permission

Mobile App Password Reset

Forgot Password?

A Caregiver can reset their own password directly from the Login screen as shown in the sequence below, from top to bottom.

Click on the **Forgot Password?** link.
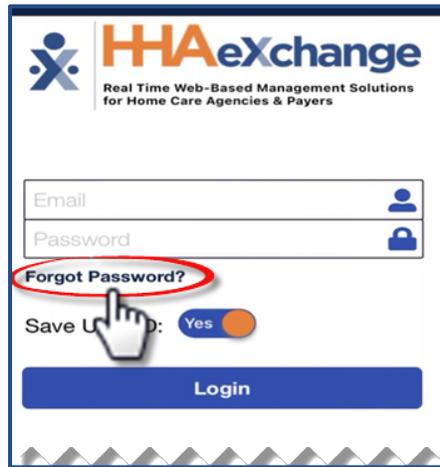
Forgot Password Link

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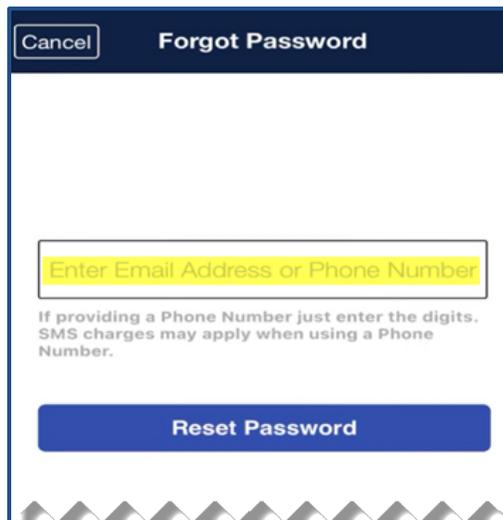
Enter Email/Phone Number

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

Password Change Fields

Note: *A Caregiver can request a password reset via the* **Forgot Password?** *link whether linked to an Agency or not.*

Account Locked

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

Account Locked

Mobile App Caregiver Time Edit Corrections

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

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

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

Refer to the Caregiver Time Edit Request Job Aid for details and instructions on the Mobile App.

Office Level Configuration

To allow Caregivers to request Mobile App EVV Time Edits, navigate to the *Edit Office* page (**Admin > Office Setup**). Under the *Mobile* section, select the **Allow Caregivers to Modify Confirmed Time via Mobile App** and/or **Allow Caregivers to enter Time via the Mobile App when there is no preexisting EVV**, as seen in the image below and described in the table underneath.

Edit Office: Caregiver Time Edit Correction Options

*Note: These are not default settings; Agencies must enable accordingly.*

If selected...	Then...
Allow Caregivers to Modify Confirmed Time via the Mobile App	All Caregivers***** in that Office are presented with an edit icon next to the Confirmed Time. This option is used to correct the time of a Clock-In and/or Clock-Out.
Allow Caregivers to Enter Time via the Mobile App when there is no Preexisting EVV	All Caregivers***** in that Office are presented with an edit icon next to the blank confirmed time (--:--).This option would be selected when the Caregiver forgot to Clock-In and/or Clock-Out.

Note: The Office Level setting for **Caregiver Time Edit can be overridden by enabling this feature per Caregiver. If disabled at the Office Level, specific Caregivers can be enabled and if enabled at the Office Level specific Caregivers can be disabled.*

Caregiver Level Configuration

If this function has been enabled at an Office level, then they are automatically checked at the Caregiver level. To override Office level settings, go to the Caregiver *Availability* page (***Caregiver > Availability***) and select **Caregiver Time Modification Agency Office Level Override** checkbox at the Caregiver Time Corrections settings.

If this feature is not enabled at the Office level, then select the desired **Caregiver Time Correction** options, as seen in the following image and described in the table underneath.
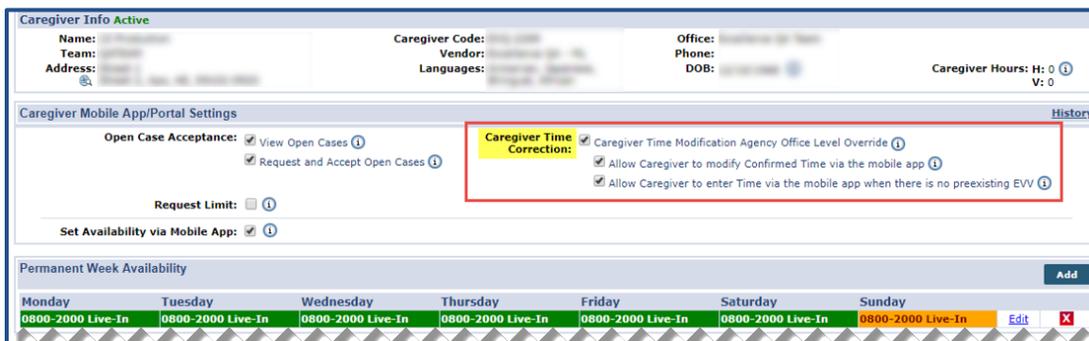
Caregiver Availability Page: Caregiver Time Edit Correction Options

If selected…	Then…
Caregiver Time Modification Agency Office Level Override	***Must be checked to enable the additional options.*** Selecting this box overrides the Office Level settings for this Caregiver.
Allow Caregiver to Modify Time via the Mobile App	this Caregiver is presented with an edit icon next to the Confirmed Time on their Mobile App.
Allow Caregiver to Enter Time via the Mobile App when there is no Preexisting EVV	this Caregiver is presented with an edit icon next to the blank confirmed time (--:--).This option would be selected when the Caregiver forgot to Clock-In and/or Clock-Out.

Note: The Office Level setting for **Caregiver Time Edit can be overridden by enabling this feature per Caregiver. If disabled at the Office Level, specific Caregivers can be enabled and if enabled at the Office Level specific Caregivers can be disabled.*

Call Dashboard Corrections Tab

To track Caregiver Time Edit Requests navigate to the **Corrections** page on the *Call Dashboard* (**Visit > Call Dashboard**). Once a Caregiver submits a Correction, these requests are routed to the *Call Dashboard Corrections* page, comprised of two sections: **Search** and **Results**, as seen in the following image.

Call Dashboard Corrections Page

Note: Role permissions must be enabled for users to view and edit information on this page. Refer to the Permissions section for details.

The Results section provides visit information per record as described in the following table.

Column	Description
1 Admission ID	Patient Admission ID
2 Caregiver Name	Caregiver requesting correction. Click on the Caregiver Name to route to the Caregiver Calendar.
3 Patient Name	Click on the Patient Name to route to the Patient Calendar.
4 Scheduled Date	The Visit Scheduled Date
5 In/Out	Indicates whether the request is for an In or Out confirmation.
6 Original Time	The original Confirmed Time for the visit.
7 Corrected Time	The Corrected Time submitted by the Caregiver
8 Reason	The correction reason captured in the Mobile App (managed via Reference Table Management)
9 Notes	If Notes are added, then an icon displays. Hover over the icon to see partial note or click on the icon to view the entire Note.
10 Sig	Hover over or click on the icon to see the read-only Patient Signature captured at the time of requested correction.
11 Requested	The Date and Time the Caregiver submitted the request.
12 Approve/ Reject	**Approve** (green) and **Reject** (red) buttons. • Select the **_Approve_** button to approve the request (if validation passes). Upon confirmation, the visit is updated with the Caregiver requested times and the visit reason and the record is removed from the results and logged in History. • Select the **_Reject_** button to reject the request. The *Caregiver Time Edit Correction Requests* window opens to make additional comments. Click **_Save_** to reject the request and remove from the grid. If *rejected*, then the Caregiver receives a message on the Mobile App, and the Confirmed Time remains unchanged.

Schedule Time Column Added to Time Correction Dashboard

A **Schedule Time** column has been added to the Time Correction Dashboard grid (*Call Dashboard > Corrections*) to easily identify which visit the corrected call/request applies to (as seen in the following image).

Call Dashboard Corrections: Added Scheduled Time Column

Click on the **Scheduled Time** link to open the *Visit Info* window, as seen in the following image.

Access Visit Info Window

Corrections Request History

Click on the **Corrections Request History** link, located on the top-right corner of the Results grid, to display a history of *Approved* and *Rejected* Caregiver Time Corrections (as illustrated in the image below).
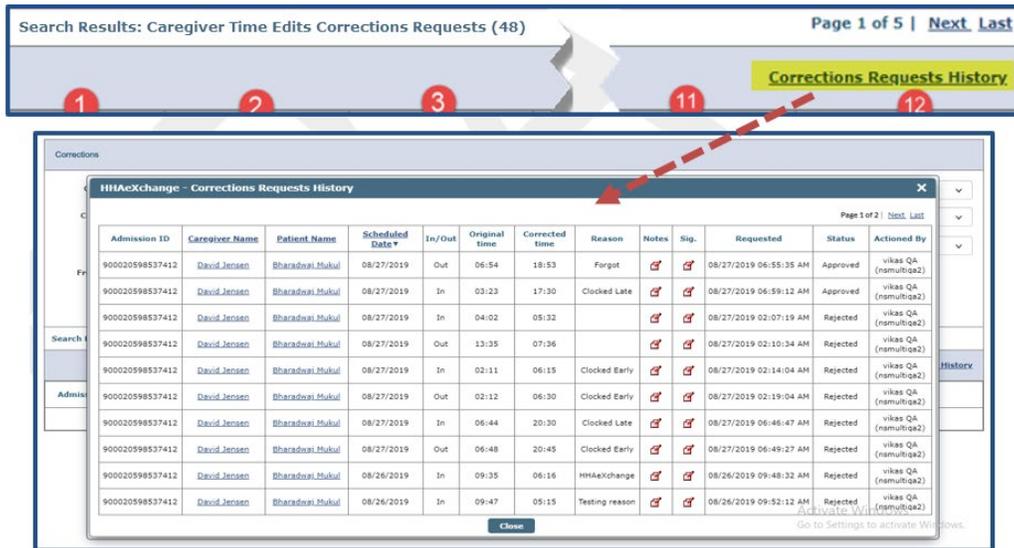
Corrections Requests History

Permissions for Call Dashboard Corrections

Role permissions must be enabled for users to view and edit information on this page. To grant permission to a role, navigate to *Admin > User Management > Edit Roles*. Select *Visit* from the **Section** field dropdown and the applicable role(s) from the **Roles** dropdown. Scroll to Call Dashboard and select *Call Dashboard Corrections* for the respective role(s).
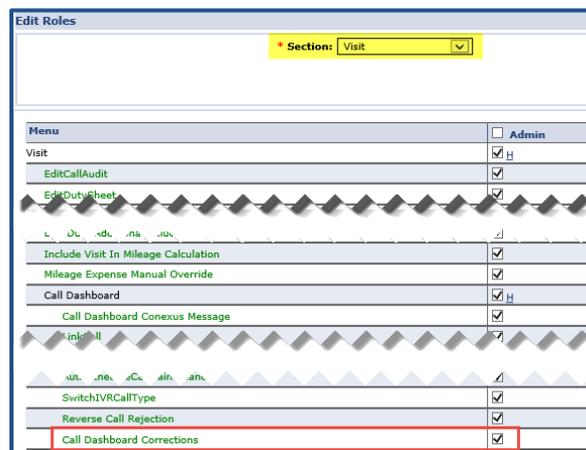
Call Dashboard Corrections Permission

Reference Table Management: Caregiver Time Edit Reasons

The *Caregiver Time Edit Reasons* are created and managed via the Reference Table Management function (**Admin > Reference Table Management**). Select *Caregiver Time Edit Reasons* from the **Reference Table** field to access. Click the **Add** button to add a reason.

Reference Table: Caregiver Time Edit Reasons

Click the **Add** button to add a Caregiver Time Edit Reason. To edit, click on the Reason name (link). The *Time Correction Reason* window opens. Enter the required **Reason** field and enter a **Reason Description** (optional). Click **Save**.
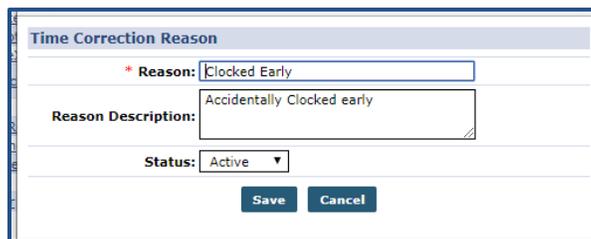
Add/Edit Time Correction Reason

Caregiver Time Edit Validations

Billed Visit Validation

A Caregiver Time Edit request cannot be processed or approved once a visit has been billed. When attempting to approve a request that has been billed, the system generates an error validation, as seen in the following image. In this case, click the Reject button to remove the request from the grid.

Visit Billed Validation

Corrections Page "Approve/Reject" (Approval>Validation Pass)
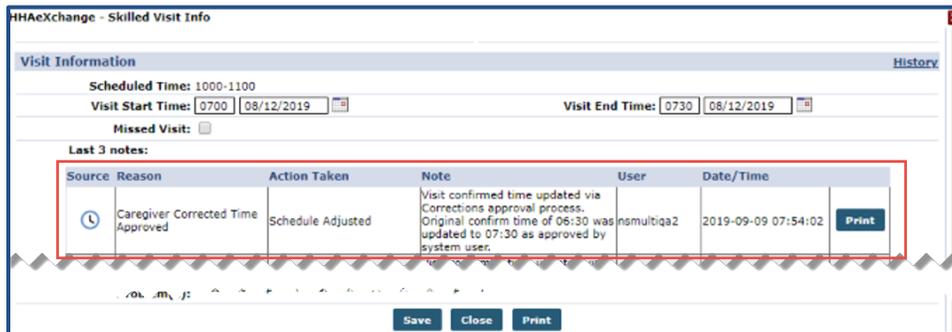
When a request is approved, the system automatically creates a Visit Note with *Caregiver Corrected Time Approved* as the selected **Reason** and *Schedule Adjusted* selected for **Action Taken** (as seen in the image below). The request is then removed from the Corrections page.

Caregiver Corrected Time (Approval) Note

Approve/Reject (Approval>Validation Fail)

Validation Fail: If validation fails, then the system generates a validation error with a suggested fix. Click **OK** to close the message. The request remains in the Corrections grid until the issue is resolved; by either approving or rejecting the request.
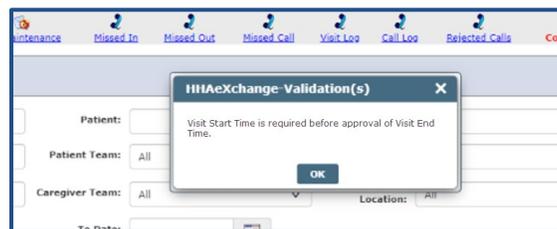
Caregiver Correction Request Validation

Alternate EVV System Verification Configuration and Reporting

The **Enable Alternate EVV Workflow** field in the *Office Setup* page (***Admin > Office Setup > Edit Office***) in the *Mobile* section 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). Once the **Enable Alternate EVV Workflow** checkbox is selected, the following options become available to select:

- the **Verification Order** dropdown field to select the order of verification (*Voice Recording* (default) or *Patient 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.
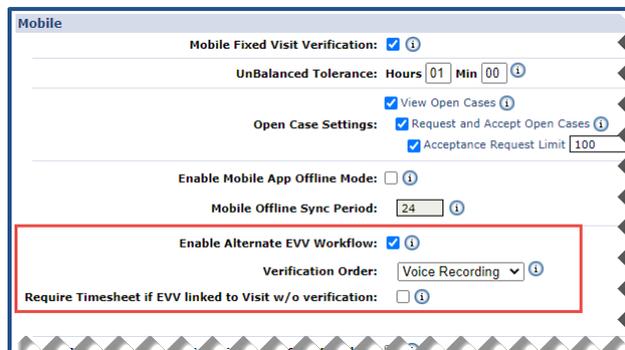
New/Edit Office: Enable Alterante EVV Workflow

Note: The Alternate EVV Workflow works for all conventionally scheduled Clock-Out scenarios. This feature applies to Single visits only (not to Consecutive or Linked visits). This feature is not currently supported in Offline Mode.

Mobile App: Alternate EVV System Verification

If the **Enable Alternate EVV Workflow** option is enabled, then the alternative EVV workflow is applied to the Mobile App. Once a Caregiver enters the necessary information, the service and time is confirmed and verified by the Patient via Voice Recording and or *Signature* (as per Agency settings).

For example, the sequence of images below illustrates the prompts of a Mobile App EVV Verification at Clock OUT (for both Voice Recording and Patient Signature).

EVV Verification Process

At either Clock In or Clock Out, the Caregiver selects the **Service** type (PCA, HHA, RN, etc.) for the visit.

Click **Next** to continue.
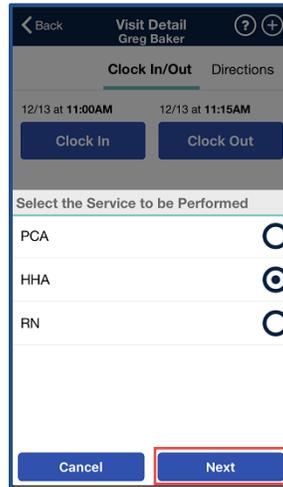
The *Client Confirmation and Verification* screen displays when performing a Clock Out for a visit with the Alternate EVV Workflow enabled. Once the related POC and/or Signature screens are saved, the app routes the Caregiver to the *Client Confirmation and Verification* screens where the Caregiver is prompted to pass their device to the Patient for further confirmation (as seen in the image below). Click **Continue** for the next screen.
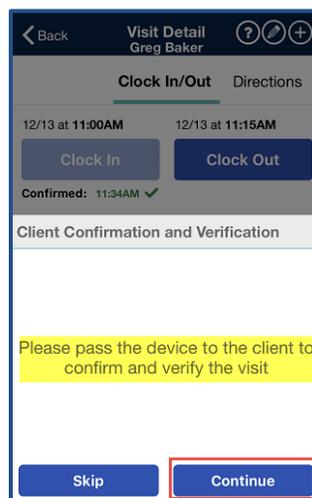
On the following screen, the Patient is required to confirm both the **Service Type** and **Visit Time** by selecting to *approve* (✓) or *reject* (X) in both fields. Press **Continue** to proceed.
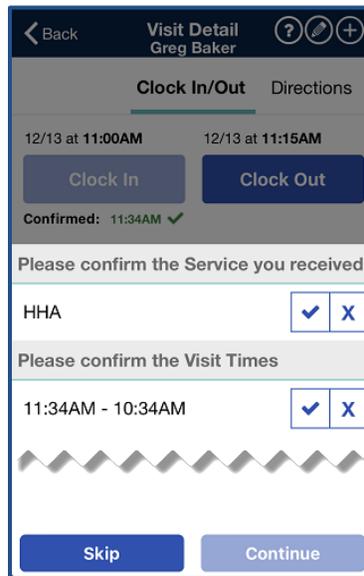
If the Patient rejects (selects X's), then the app navigates to the *Visit Confirmation Status* (last) screen where both the **Service** and **Visit Time** fields appear as **Unverified** (in red font) for the shift.

**Note:** *Regardless of the response, the visit Clock Out is registered.*

In the following example, the Patient has approved the **Service** and **Visit Time** by selecting the checkmarks (✓). The Patient can choose either one (or both) to verify the visit. Press the **Verify Visit** button to continue with the verification process.
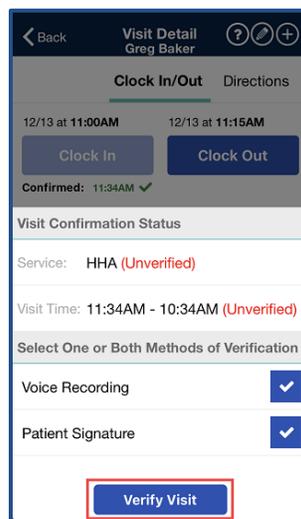
The app navigates to the next screen prompting for a ***Voice Recording*** and/or ***Patient Signature*** (based on the order set up in the HHAX system). The following screens illustrate an example where both methods of verification are used (*Voice Recording* followed by *Patient Signature*).

Voice Verification View

From the *Voice Note* screen, follow the prompts to begin recording verification. The app displays a counter to show how much time is left to record. The app prompts to stop recording.
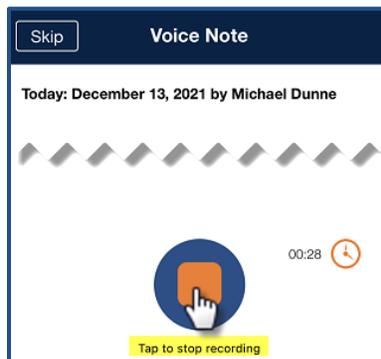
To review the recorded message (verification), tap on the play icon. Press ***Save*** to continue.
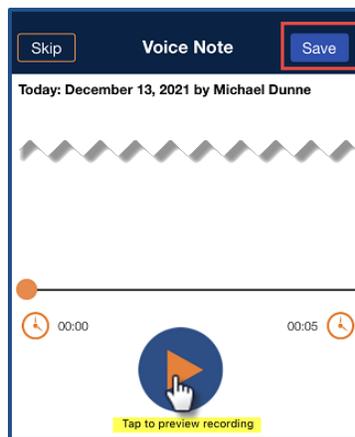
Patient Signature Verification View

Once the Voice Recording is saved, the Patient Signature screen appears for the Patient to verify via signature. Once complete, press the ***Save*** button to continue.

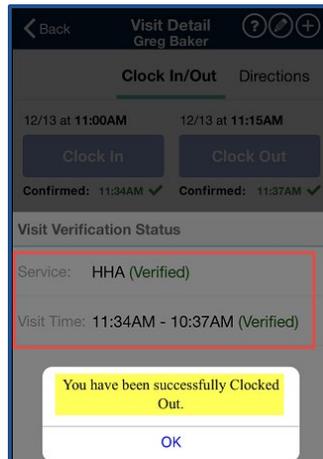*Note: In either case, the Patient can press **Skip** which marks the visit as **Unverified**. If a Patient Signature is skipped, the app prompts for a Reason.*

Once the visit is confirmed by the Patient (as per the EVV Workflow), the **Service** and **Visit Time** display as **(Verified)** in green text. A message on the screen also indicates of a successful Clock Out.

*Note: If a Patient rejects the verification, the **Service** and **Visit Time** fields remain **Unverified** (red text).*

Alternate EVV System Verification (Offline Support)

The **Alternate EVV Workflow** option has been extended to include Offline support, Consecutive Shifts and Linked Patients workflows. For Linked Patients, both Patients must verify and confirm the visit at the end of workflow.

- Consecutive Shifts: Existing Patient Confirmation at the end of the workflow
- Offline mode: Transparent Patient Confirmation
- Linked Patients: Both Patients must confirm

Note: These workflows also work in the Offline mode.

Capturing Caregiver and Nurse Signatures

The system has been updated to comply with certain EVV state requirements such as capturing and storing additional signatures from the Caregiver and Nurse (if configured), in addition to the Patient Signature. As configured in the system at a Contract level, the Caregiver is presented with these signature screens when Clocking In and/or Clocking Out of a visit.

Capturing Signatures

In the *Contract Setup* (***Admin > Contract Search > Contract***), two signature requirement options have been added to the *Scheduling/Confirmation* tab to capture the **Caregiver Signature** and **RN Signature** on the Mobile App, as seen in the following image.
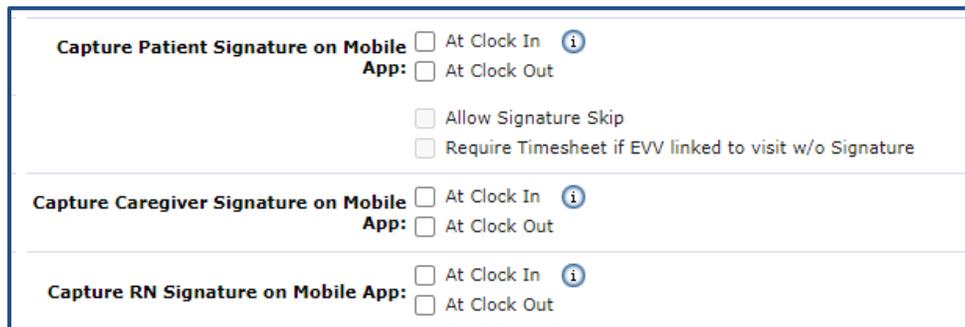
Contract Setup: Capturing Signature Settings

Additional Signatures on the Mobile App

Based on the selections for these options, signature requirements are presented on the Mobile App when the Caregiver performs a Clock In and/or Clock Out, as configured at the Contract level. All Signature screens contain a different color header to differentiate them from one another.

Caregiver Signature

Required: If selected

- Caregiver presented with Signature Screen
- Caregiver must sign to proceed (cannot skip)
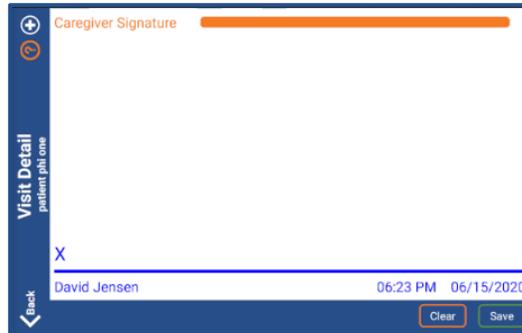
Caregiver Signature Screen
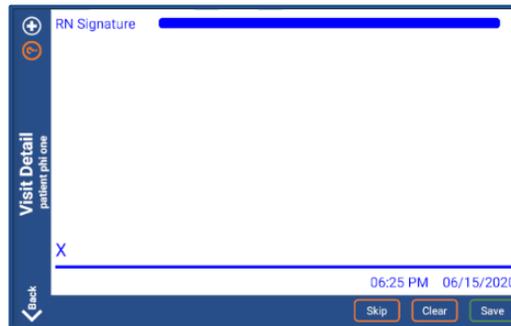
RN Signature

Optional: If selected

- RN presented with Signature Screen

- Can be skipped if RN is not present to sign

RN Signature Screen

Patient Signature

Required: If selected (as configured)

- Patient presented with Signature Screen

- Can be skipped if **Allow Signature Skip** is selected; otherwise, Patient must sign to proceed.


Patient Signature Screen

Automatic Time Setting Option

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

A warning alert is displayed (as seen in the image below) if the time on the user's Mobile App is not in sync with the server. This occurs when the device time setting is NOT using the Automatic Time setting. As suggested, this alert instructs the user to change their settings to ensure proper operation of the application.
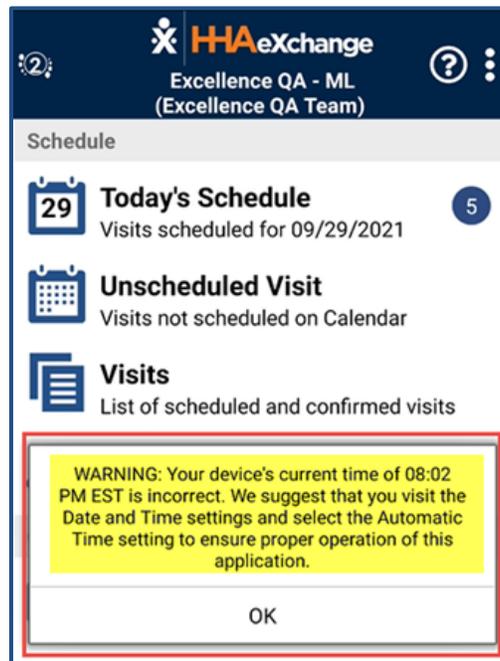
Note: __HHAX does not change the setting__; Users must change their own settings on their device. In addition, retaining the Manual Time setting does not prevent a user from using the Mobile App.

Mobile App Caregiver Compliance Alerts

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

To enable this feature, navigate to the *Office Setup* page (**Admin > Office Setup**). On the *Mobile* section, select the **Allow the Caregiver to view Compliance information via the Mobile App** checkbox. Once selected, indicate the number of days in respective **days before due date** text boxes to:

- **Display Medical Items**
- **Display Other Items**
- **Display In-Service Items**

Office Setup: Caregiver Compliance Alert Feature

Note: This feature is available to all Agencies on the latest version of the Caregiver Compliance module.

Mobile App Compliance Page

The informational *Compliance* screen on the Mobile App is accessed from the main screen, as seen in the following image. The encircled number in red in the main page indicates the number of items needing attention.
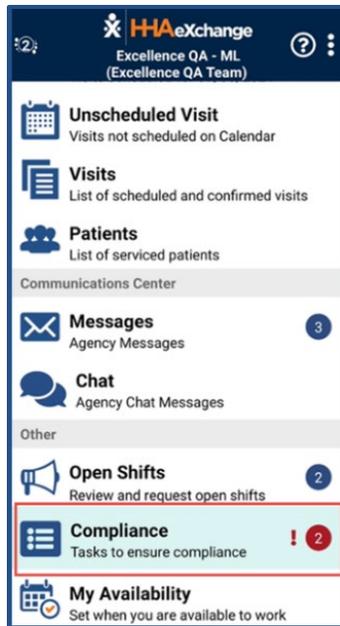
New Compliance Alert Option

Select the *Compliance* option to view high-level information (such as **Type**, **Due Date**, and **Completed Status**) for all the Caregiver's Compliance items, as seen in the image below.

Compliance Screen

- Overdue items have bolded titles under the **Name/Type** column

- Under the **Completed** column, Overdue items are clearly categorized as *Overdue* and marked with a red dot.

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

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

Compliance Screen

Caregiver Awake/Alert Confirmation

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

To enable this feature, navigate to the *Office Setup* page (**Admin > Office Setup**). On the *Mobile* section, select the **Enable the I'm Awake button for midnight shifts** checkbox.
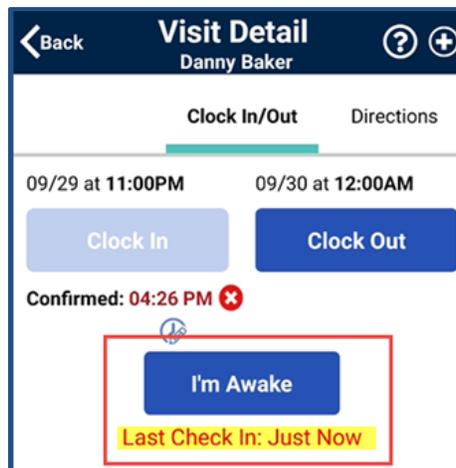
Note: Selecting this option enables the feature for <u>all</u> Caregivers in the Office.
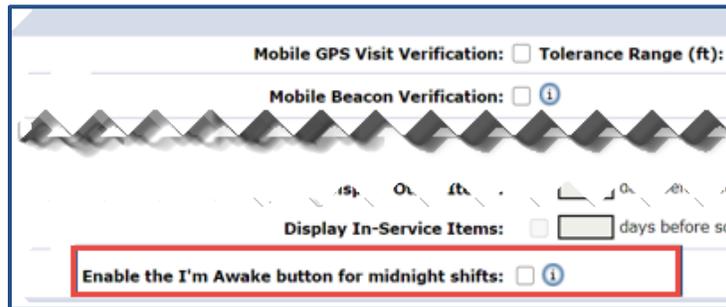
Office Setup: Caregiver Compliance Alert Feature

On the Mobile App

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

Mobile App: I'm Awake Button

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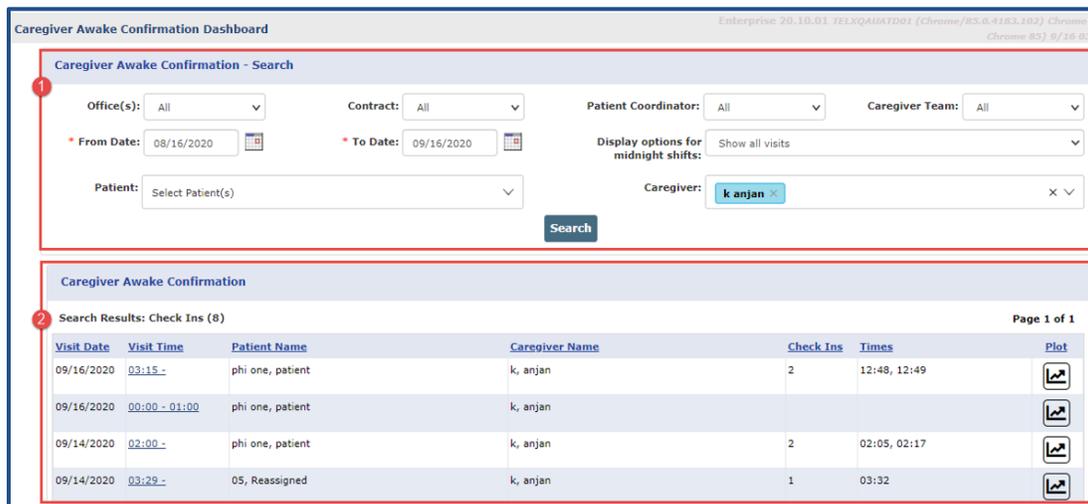

Last Check In

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

Caregiver Awake Confirmation Dashboard

Providers can review and monitor activity via the *Caregiver Awake Confirmation Dashboard* (***Visit > Caregiver Awake Confirmation Dashboard***), as seen in the following image. This Dashboard is comprised of two sections to include search filters and search results.

Use the search filters to locate a specific visit or click the ***Search*** button to see all. On the *Search Results*, each row offers details such as the **Visit Date**, **Visit Time**, **Patient Name**, **Caregiver Name**, (number of) **Check-Ins**, **Times** (checked in) and a **Plot** icon.

Caregiver Awake Confirmation Dashboard

To view a graphical representation of visit Check-In activity on a continuum (from the time of Clock-IN to the time of Clock-OUT), click on the ***Plot*** icon for the visit. Each Check-In is represented by a red encircled dot and time. Click ***OK*** to exit this window.

Awake Visit Check-Ins

GPS EVV Method to Reduce OOR Exceptions

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

In the *Mobile* section of the *Office Setup* page (***Admin > Office Setup***), select the **Mobile GPS Visit Verification** checkbox and define the **Tolerance Range**.
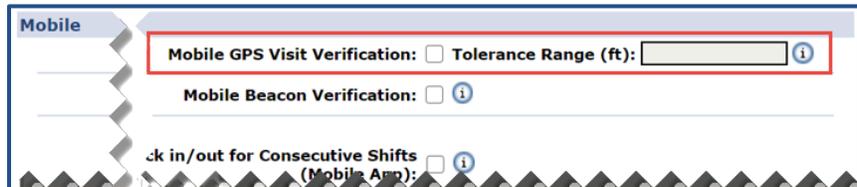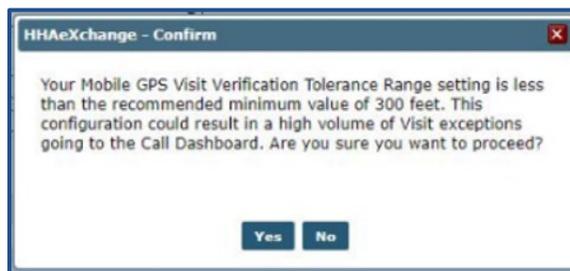

Office Setup: Mobile GPS Visit Verification Tolerance Range

Note: *Recommended setting is 300 feet.*

Warning Confirmation Tolerance Range below 300 Feet

The system is set to issue a warning confirmation (as seen in the following image) when the **Mobile GPS Visit Verification Tolerance Range** is set to less than 300 feet; the recommended minimum value.


Warning: Tolerance Range Less than 300 Feet

On the Mobile App

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

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

The following image indicates that the Caregiver is likely **Out of Range**.
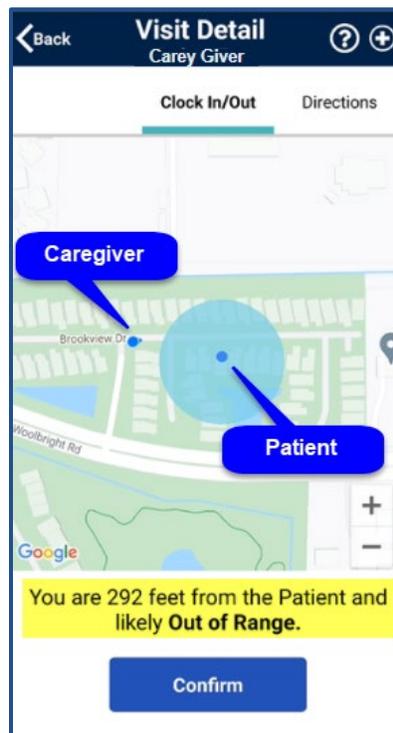

Mobile App: Out of Range

The image below illustrates the Caregiver closer to the Patient and **In Range**. Once **In Range**, the Caregiver can click on the ***Confirm*** button to capture the EVV.
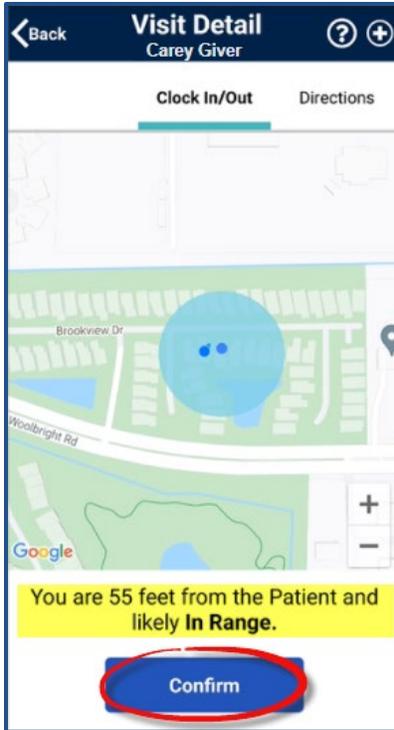
Mobile App: In Range

Patient Address PIN on GPS Map Confirmation

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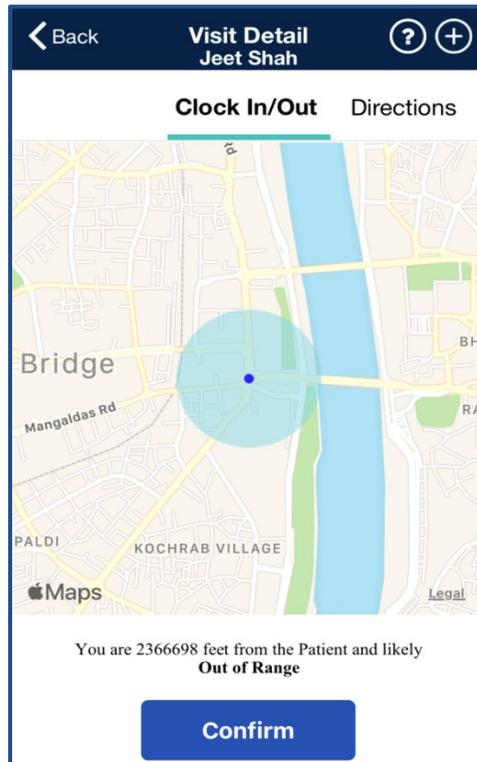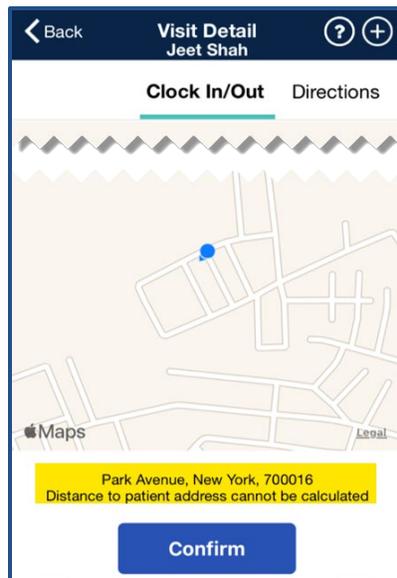

Patient Address with Coordinates

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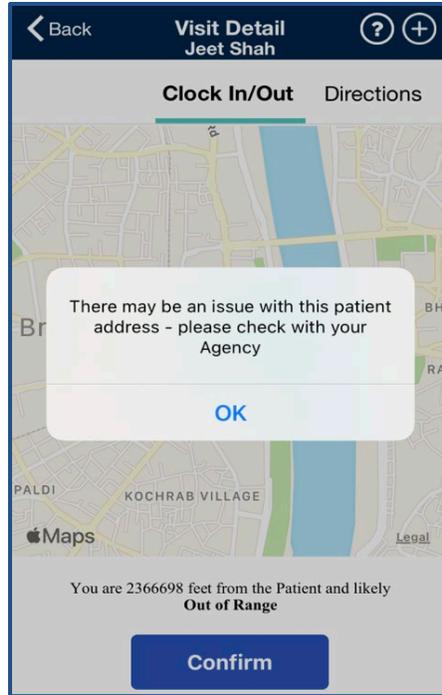
Alert: Issues with Patient Address

In cases where the Patient Address is not GPS-enabled without available coordinates, the screen displays only the Caregiver location, as denoted by the blue dot and arrow. The Patient Address is listed at the bottom of the screen (highlighted in the image). When the Caregiver clicks on the ***Confirm*** button, the same alert (as seen in the image above) appears.


Patient Address without Coordinates

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

Post-Visit POC Edit Time

Providers can set the allowed time that a Caregiver must add or edit the POC for a visit on the Mobile App. In the past, the time was a fixed 26-hour post-visit window.

To update this setting, navigate to the *Mobile* section in the *Office Setup* page (***Admin > Office Setup***). Enter the number of hours (0-999) in the **Time in hours that a Caregiver can update Duties after a Patient Visit** text field.
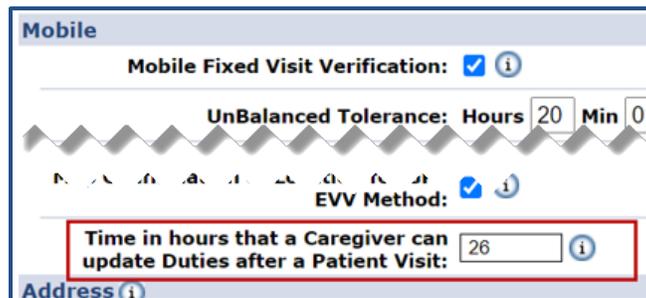


Office Setup: Post-Visit POC Edit Time

Note: The default setting is 26 hours.

There is no difference in the Mobile App. The Caregiver continues to see the Patient POC and make applicable edits in the time defined by the Agency.

Mobile: Extend Visit End Time

The **Extend the Visit End Time** setting allows Providers to determine the exact end time for a shift within the Caregivers clock-out process. This setting extends the Visit End Time beyond the timestamp that occurs once **Clock Out** is selected on the Mobile App, accounting for the time spent thereafter entering required information (such as POC duties, VBC duties, and Patient Signature).

With this setting enabled, the **Visit End Time** is captured once the Caregiver completes all required visit information on the Mobile App. The **Extend the visit end time to include time to enter duties** setting is selected by default (as seen in the following image), in the *Office Setup* page (**Admin > Office Setup**) and in the *Mobile* section.
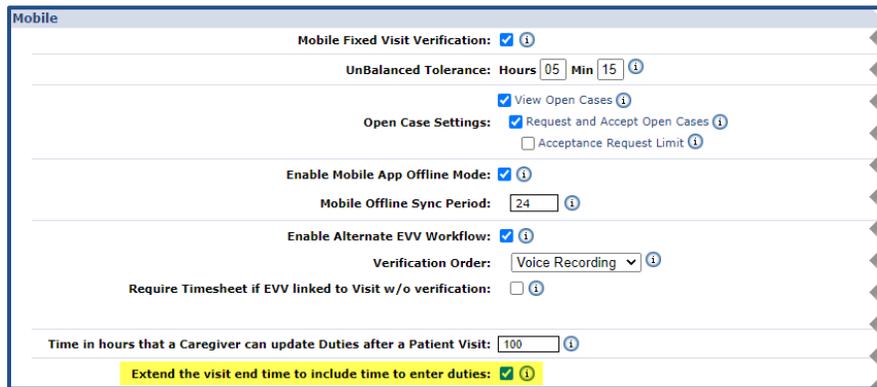
Office Setup: Mobile: Extend Visit End Time

On the Mobile App

Once all information is entered, the Caregiver is advised of a successful Clock Out, as illustrated in the image below.
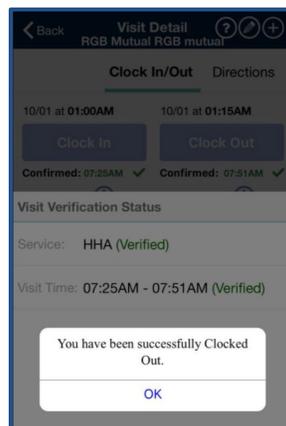
Successful Clock Out

Prevent Restricted Caregivers from Viewing Patient Information

When a Caregiver is placed on a Patient's Restriction list (***Patient > Caregiver HX > Declined Caregivers***), the Patient information is hidden on the Mobile App, even if they previously serviced the Patient.

Patient information is hidden on the Caregiver's Mobile App as of the date of restriction until the restriction is removed. Once the restriction is removed, the Patient information reappears once the Caregiver is scheduled to service the Patient. The Patient will only display on the Patients tab after the next scheduled visit is created based on the aging view rules, as follows:

- Unscheduled visit: Not displayed after 30 days
- Patients tab: Not displayed after 15 days
- Visits Tab: 7 days (Caregiver can search a past date for up to one year to see Patient info)

This update applies to the following screens: **Today's Schedule**, **Unscheduled Visits**, **Visits**, **Patients**, and **Open Shifts**.

Mobile App Integration

HHAeXchange works with many integration partners. The following image illustrates the banner that appears on the HHAX Mobile App Home screen once an Agency purchases one or more integration services. Click on the *Go* button to open the integration partners' websites.
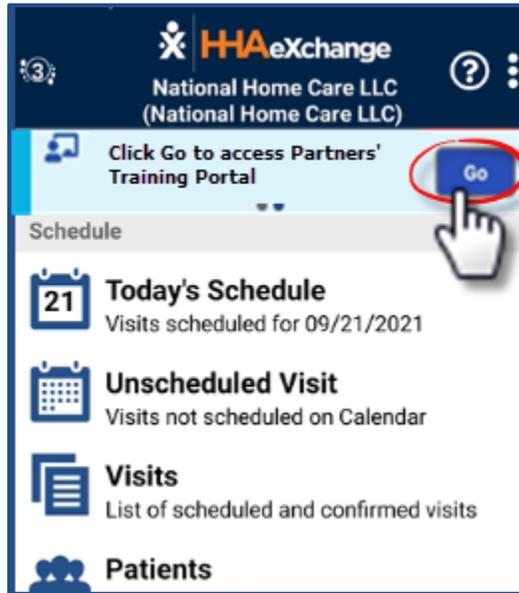
Mobile App: Integration Services Banner

Mobile App Biometric Two-Factor Authentication

The **Mobile App Biometric Two-Factor Authentication** (2FA) allows Agencies to add another layer of security to the login process on the Mobile App. Once activated, mobile-enabled Caregivers must perform 2FA with fingerprint or facial recognition biometrics, if supported by their device.
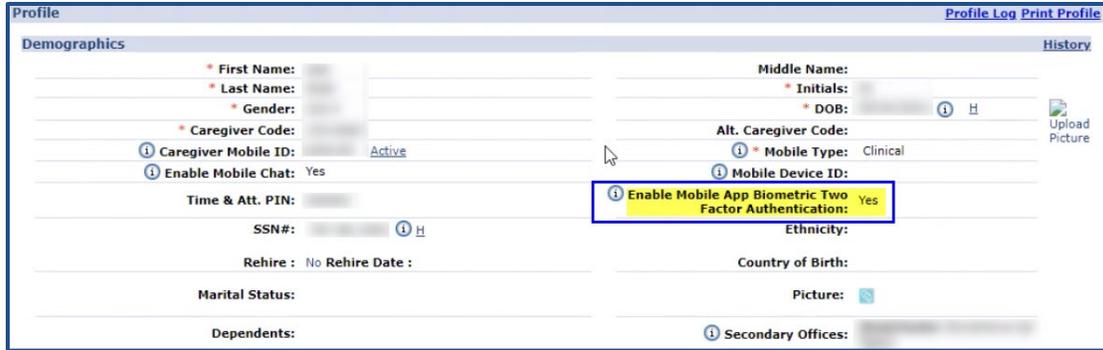
Office Level Setting

To enable the Mobile App Biometric Two-Factor Authentication setting, navigate to the *Office Setup* page (**Admin > Office Setup**) and select the **Enable Mobile App Biometric Two-Factor Authentication** checkbox in the *Mobile* section, as seen in the following image. Once the feature is enabled at the Office level, all mobile-enabled Caregivers are prompted to perform 2FA after logging into the app.

Office Setup: Mobile: Enable Mobile App Biometric 2FA Checkbox

Caregiver Profile Setting

The Mobile App Biometric Two-Factor Authentication setting can also be managed in the Caregiver Profile in the *Demographics* section, as seen in the following image. For example, for those Caregivers who do not have a device that supports the feature, select *No* (disable) in the **Enable Mobile App Two Factor Authentication** field. The setting at the Caregiver Profile level overrides the Office level setting.

**Caregiver Profile: Enable Mobile App Biometric 2FA Setting**

Note: If this setting is not enabled at the Office level, then it is not available to edit in the Caregiver Profile.

Mobile Biometric Two-Factor Authentication (On the Mobile App)

On the Mobile App, Caregivers are prompted to authenticate their login via biometric measures, as configured by the Agency. Some Agencies may configure biometric two-factor authentication for stronger security. The Biometric options currently supported are fingerprint and facial recognition if available on the mobile device.

Facial Recognition

The following image illustrates the screen when facial recognition is required for authentication.
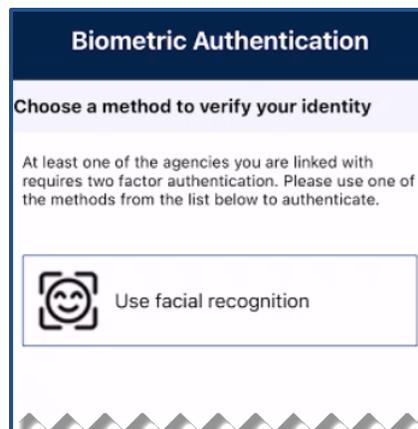
Facial Recognition Required

Once confirmed, the app alerts of a successful facial recognition and logs the user in.
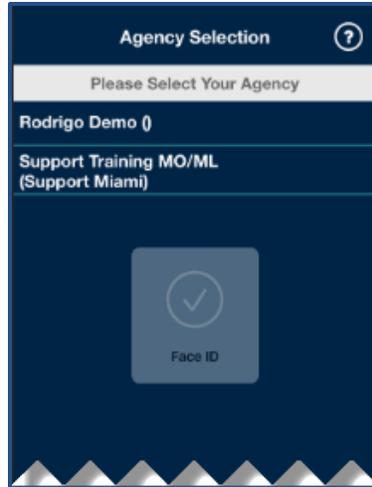
Success: Face ID

If facial recognition is not successful, the app alerts to retry, as seen in the imagebelow.
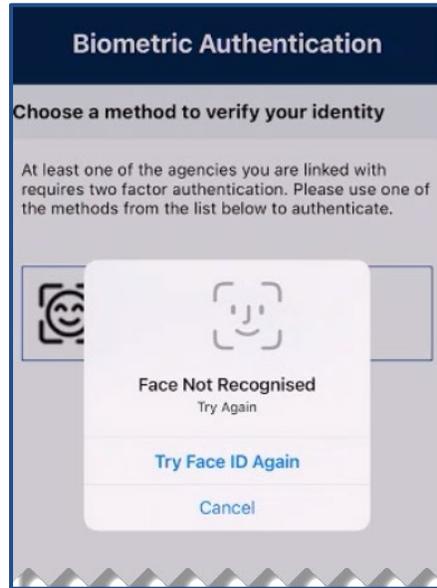

Face Not Recognized

Fingerprint Recognition

The following images illustrate a sequence of screens (from top to bottom) when fingerprint recognition is required for authentication. The initial screen prompts the user to press on the **Use your Fingerprint** box to authenticate.
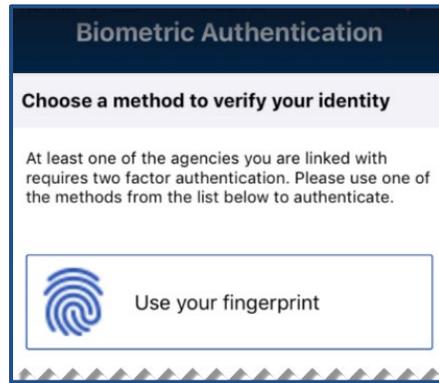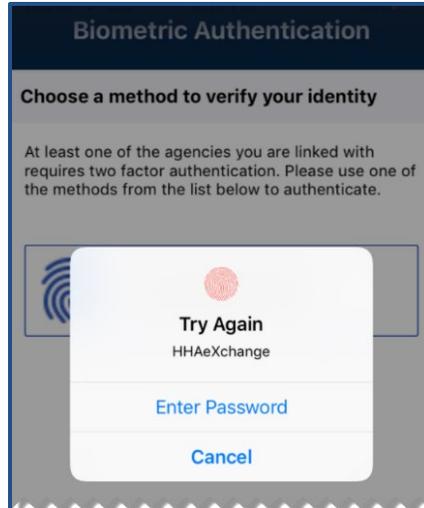

Fingerprint Recognition Required

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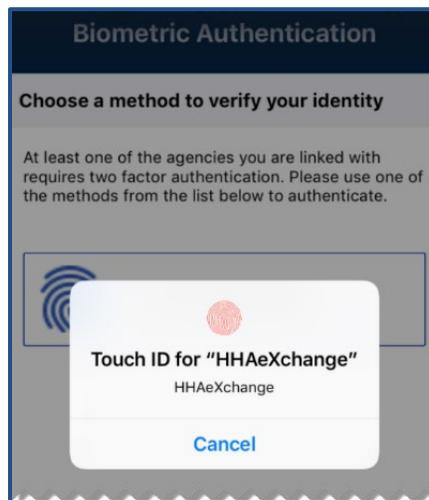

Use Touch ID to Authenticate

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

Retry Authentication

Biometric Authentication Not Configured/Supported

If the device is either not configured or does not support fingerprint or facial recognition, then the screen indicates steps to take, as seen in the image below. Tap on the **Settings** button to configure the feature or tap on the **Exit** button and contact the Agency for further instructions.
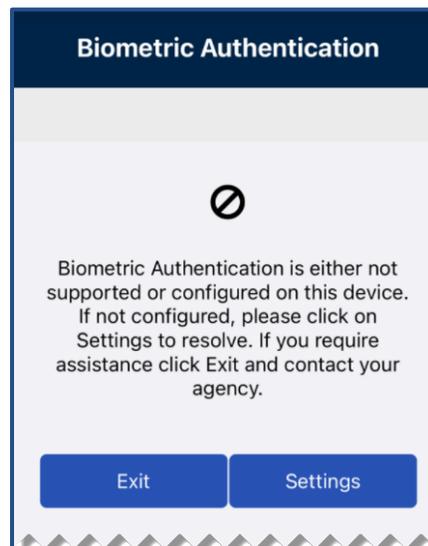

Device Not Configured/Supported

Mobile App: Community Visits

This option allows Agencies to link a visit marked as a **Community Visit** to bypass the validation for tolerance set in Office Settings in the *Mobile* section. When enabled, visits marked as Community Visits are linked automatically. The **Community Visit** option applies to *Scheduled* and *Unscheduled Visits*.

Office Level Setting

To enable the *Community Visit* setting, navigate to the *Office Setup* page (**Admin > Office Setup**) and select the **Allow Caregiver to select the visit as a Community visit** checkbox in the *Mobile* section, as seen in the following image. Once the feature is enabled at the Office level, all mobile-enabled Caregivers can select the Community Visit option on the HHAX Mobile App.
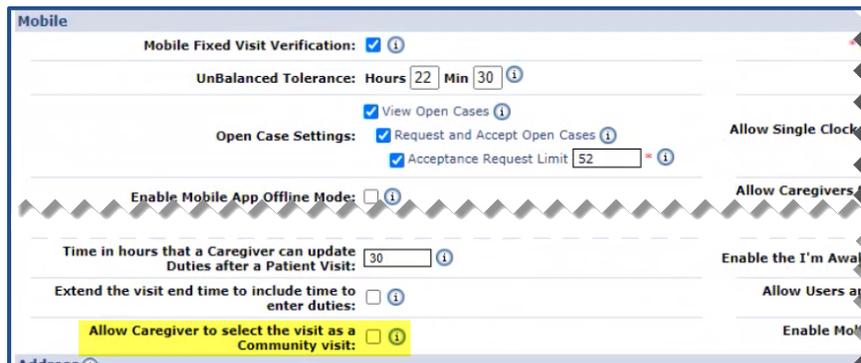
Office Setup: Mobile: Allow Caregiver to Select Community Visit Checkbox

Caregiver Level Setting

When the **Allow Caregiver to select the visit as a Community Visit** feature is enabled at the Office level, all mobile-enabled app users can use the feature. An Agency can override the Office level configuration for a specific Caregiver via their Caregiver Profile (**Caregiver > Profile**).

On the *Caregiver Profile*, click on the **Edit** button to enable editing in the profile. Deselect the **Allow Caregiver to select the visit as a Community visit** checkbox to disable the setting.

**Caregiver Profile: Caregiver Community Visit Setting**

Community Visits (On the Mobile App)

On the Mobile App, Caregivers can mark a visit as a *Community Visit* by clicking on the store icon located at the bottom-left of the screen, as seen in the following image. The **Community Visit** checkbox appears.
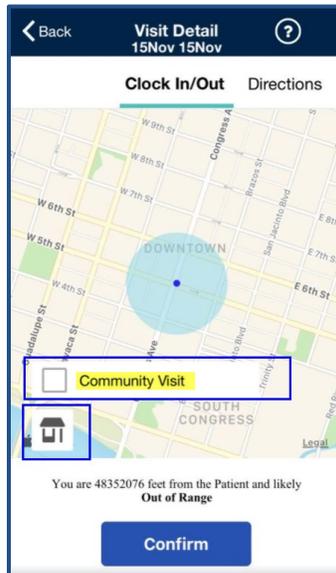
Community Visit Option

Select the checkbox and tap on the **Confirm** button, as seen in the following image.
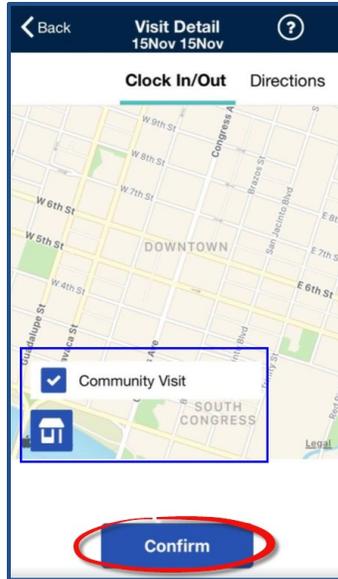
Community Visit Selected

Note: *The Community Visit option can be selected and deselected at Clock In and at Clock Out.*

Mobile App: Unscheduled Visits Select Service Code

Select the **Enable Unscheduled Visit Service Code Selection** checkbox in the *Edit Office* page (***Admin > Office Setup***) in the *Mobile* section for the Caregiver to select the applicable visit Service Code on *Clock In* for an Unscheduled Visit. This feature appears if multiple Service Codes are available in the Member's Active Authorizations.

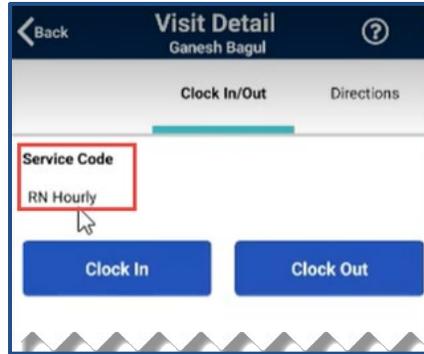**Enable Unscheduled Visit Service Code Selection**

On the Mobile App

From the Visit Detail screen, select the applicable **Service Code**.
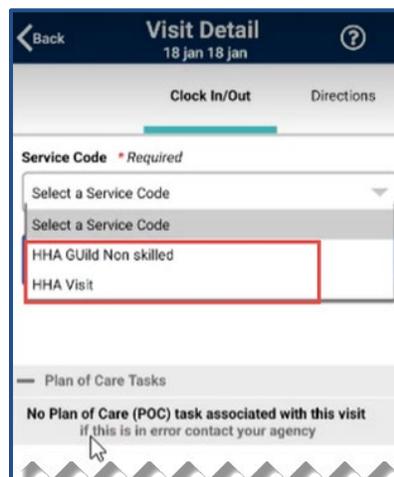
Selecting a Service Code for an Unscheduled Visit

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

Only One Service Code Available

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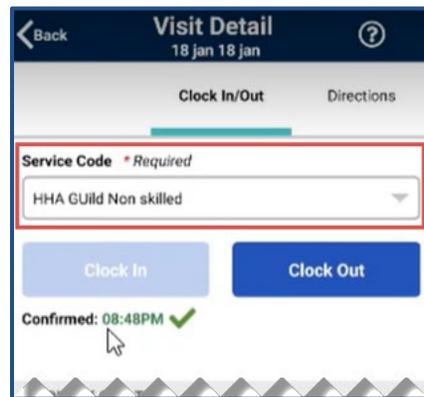
Changing Service Code on Clock Out

Configuration for Other POC Duties

By default, the **Display Other POC Duties when there are POC Duties assigned** and **Display Other POC Duties when there are no POC Duties assigned** are selected allowing Providers to control the display of *Other Tasks* (POC Duties) on the Mobile App, as seen in the following image.
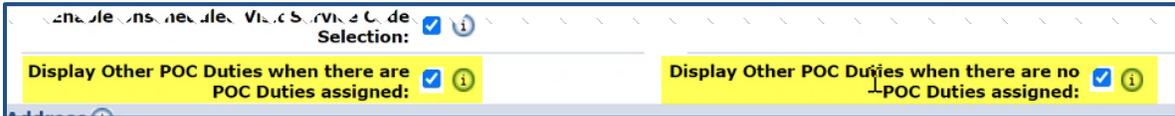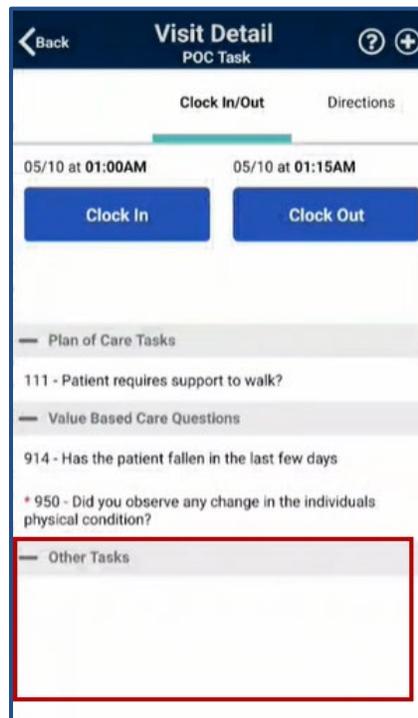

Mobile Office Level: Other POC Duties Checkboxes

Providers can choose to disable these settings to reduce overhead and clutter.

On the Mobile App

When these settings are disabled by the Provider, the *Other Tasks* (POC Duties) section appears empty on the Mobile App, as seen in the following image.

Mobile App: Other Tasks Section

Patient POC on Unscheduled Visits

The system has been enhanced to present duties on the Mobile App when an Unscheduled Visit is created for a Patient with an active authorization and an associated POC. The POC is automatically selected and viewed via the ***Automatic Creation of Schedules*** feature (***Visit > Call Dashboard > Automatic Creation of Schedules***), as seen in the following screen.
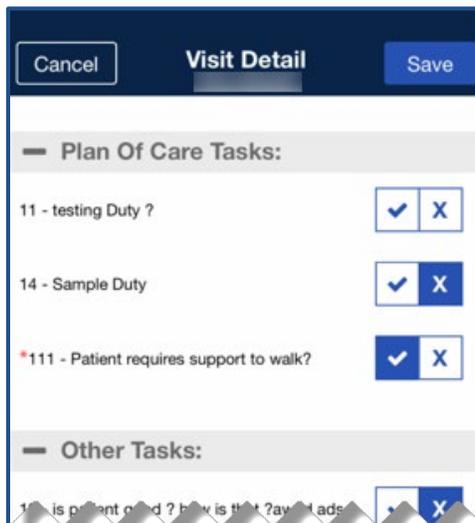

Associated POC

On the Mobile App

When the Caregiver Clocks-Out of the Unscheduled Visit, the *Plan of Care Tasks* are displayed when an *Unscheduled Visit* is created for a Patient who has *one* active Authorization with POC Tasks.


POC Tasks Displayed for Unscheduled Visit

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

Log Duties Throughout the Shift

Caregivers can enter or edit POC/VBC duties via the Mobile App throughout a visit as they are performed. Alerts will not be generated until after the Clock Out and duties are saved.

To enable this feature, navigate to the *Mobile App* section in the *Edit Office* page (***Admin > Office Setup***) and select the **Allow Caregiver to Log Duties after Clock In** checkbox.
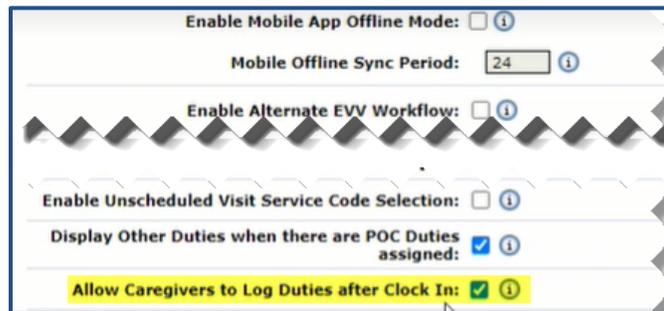
Edit Office: Mobile App Section: Log Duties After Clock In Checkbox

On the Mobile App

When this option is enabled by the Agency, the **Duties** tab displays once the Caregiver Clocks In. From the *Duties* tab, the Caregiver can log tasks performed throughout the visit. Upon Clock Out, the Caregiver can add and/or modify tasks performed throughout the visit.

Duties Tab