



Mobile App Process Guide (Providers)

Agency Setup and Management

Document Revision History

Date	Description of Revision
11/28/2018	Initial version of the document
01/08/2020	Added Mobile Offline Mode and Mobile User Management
03/05/2020	Updated Mobile Offline Mode
10/26/2020	Added GPS EVV Method Enhancement to Reduce OOR Exceptions
01/14/2021	Added features to Caregiver Mobile App (refer to Mobile App Caregiver Process Guide)

Table of Contents

Overview	1
Agency Setup.....	2
Mobile Verification and Tolerance Range.....	2
Validate the Mobile ID	3
Patient Multi-Address	3
The Mobile Device ID	5
Agency Management.....	6
Call Maintenance	6
Mobile App Offline Mode	7
Caregiver Mobile App	7
Caveats.....	8
Offline Authentication	9
Mobile User Management	10
Mobile User Management - History	11
GPS EVV Method Enhancement to Reduce OOR Exceptions	12
On the Mobile App.....	12

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.

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 Customer Support](#).

HHAX System Key Terms and Definitions

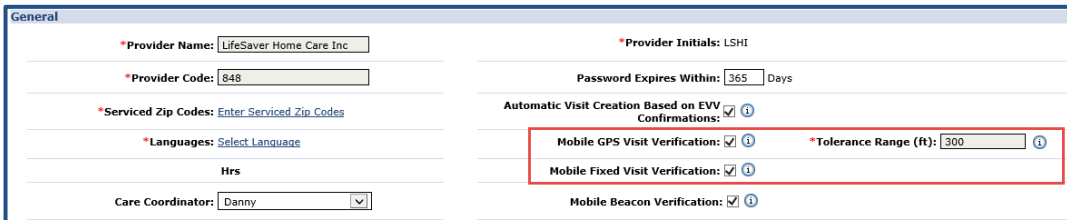
The following provides basic definition of HHAX System key terms applicable throughout the document.

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

Agency Setup

Mobile Verification and Tolerance Range

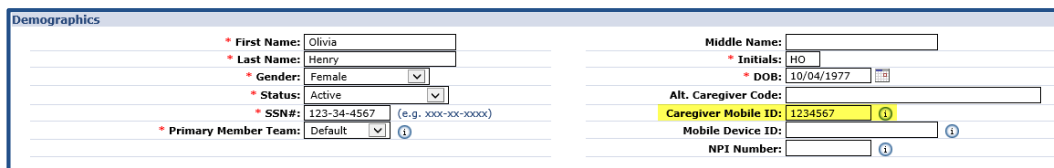
Agencies must authorize the use of the HHAX Mobile App before any Caregiver can connect and place EVVs from their mobile device. Complete the following steps to set up the connection.

Step	Action						
1	Navigate to Admin > Provider Profile .						
2	The Provider Info page opens. In the General section, select the Mobile GPS Visit Verification and Mobile Fixed Visit Verification checkboxes.  Mobile App Setup <table border="1"> <thead> <tr> <th>Field</th><th>Description</th></tr> </thead> <tbody> <tr> <td>Mobile GPS Visit Verification</td><td>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.</td></tr> <tr> <td>Mobile Fixed Visit Verification</td><td>Use a FOB device with the Mobile App</td></tr> </tbody> </table> 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.	Field	Description	Mobile GPS Visit Verification	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.	Mobile Fixed Visit Verification	Use a FOB device with the Mobile App
Field	Description						
Mobile GPS Visit Verification	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.						
Mobile Fixed Visit Verification	Use a FOB device with the Mobile App						
3	Click the Save button to register the selections.						

Validate the Mobile ID

Once the Agency 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 <i>Demographics</i> section, enter the Caregiver Mobile ID (7-digit number provided by the Caregiver when registering in the Mobile App). 
4	Click the Save button to sync the Caregiver's Mobile App with the system.

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 Info - Active									
Name: Archer Michael		Admission ID: LIS-7897654654321570		Patient ID:		Contract: Amazing Health			
DOB: XX/XX/XXXX		Primary Alt. Patient ID:		Home Phone: 305-333-3333		Address: XXX, XXX, Coral Gables, FL, 33145			
Coordinators: Kenny Williams		Office: Lisset's Office		Languages: English					
Print Profile									
History									
Demographics									
First Name: Michael				Middle Name:					
Last Name: Archer				DOB: XX/XX/XXXX					
Gender: Male				Coordinator: Kenny Williams					
Address									
Address line 1	Address line 2	City	State	County	Zip	Cross Street	Primary	Address Type(s)	Notes
1234 Coral Way		Coral Gables	FL	Miami-dade	33145		Yes		H
4500 Bird Road		Miami	FL	Miami-dade	33157		No		H
Phone Number Information									
History									

Patient Profile – Multiple Addresses

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

Visit Detail	
Andrew Tate	
Phone 1: 173-213-1231 Phone 2: 327-234-2353 Phone 3: 347-345-3453	
Address 1: 28 W Flagler St., Suite 802, MIAMI, FL, 33130 Address 2: 29 W Flagler St., Suite 902, MIAMI, FL, 33130 Address 3: 30 W Flagler St., Suite 1002, MIAMI, FL, 33130	
Emergency Contacts	
Billing/Mailing Information	

Patient Multi-Address on Mobile App

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 the Caregiver Profile (as illustrated in the image below).

Demographics	
* First Name:	Olivia
* Last Name:	Henry
* Gender:	Female
* Status:	Active
* SSN#:	123-34-4567 (e.g., xxx-xx-xxxx)
* Primary Member Team:	Default
Middle Name:	
* Initials:	HO
* DOB:	10/04/1977
Alt. Caregiver Code:	
Caregiver Mobile ID:	1234567
Mobile Device ID:	12345678910111213
NPI Number:	

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 now displays the **Mobile Device ID** when Caregivers login.

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).

Search Results Total Calls (21)							
Automatic Creation of Schedules Reprocess Legend							
Assign. ID#	Caregiver Code	Caregiver Name	Office Name	Call Type	Caller ID	Status	Action
100039	1039	Deere Tom	Citi Caregiver	IN H	917-855-4182	No Schedule on Calendar	Reject
100001	1001	Smith Jack	Long Island	OUT H (5)	NA	 No Schedule on Calendar	Reject
100001	1001	Smith Jack	Long Island	IN H	NA	 No Schedule on Calendar	Reject

The GPS Icon on Call Maintenance

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. Once enabled, Caregivers can Clock IN/OUT successfully while offline. Once the internet connectivity is restored, the Mobile App synchronizes with the HHAX system and new and modified Visit information is exchanged between the HHAX system and the Caregiver Mobile App according to the sync period.

The Mobile Offline Mode functionality is enabled at the Agency level. To manage the feature, navigate to **Admin > Agency Info**. In the *General* 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).



The screenshot shows the 'Agency Info' page with the 'General' tab selected. On the right side, the 'Enable Mobile App Offline Mode' checkbox is checked, and the 'Mobile Offline Sync Period' is set to 24 hours. A red box highlights these two fields. Other visible fields include 'Agency Name', 'Agency Code', 'Agency Initials', 'Password Expires Within', 'Automatic Visit Creation Based on EVV Confirmations', 'Mobile GPS Visit Verification', 'Mobile Fixed Visit Verification', 'Mobile Beacon Verification', and 'Service Coordinator'.

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.

Caregiver Mobile App

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

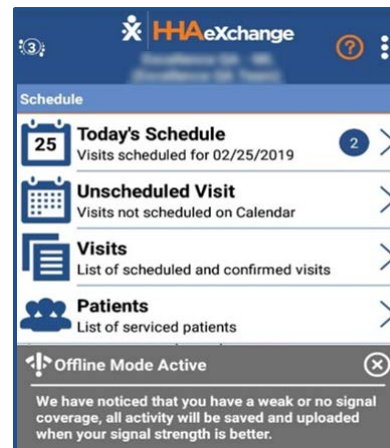
- Logging In
- Switching Agencies
- Changing Languages

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).

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

- Clock-IN/OUT, and
- Enter Duties

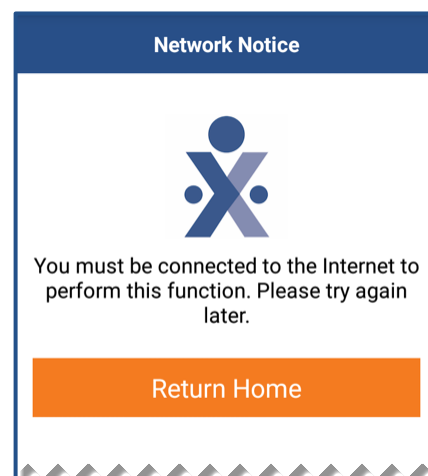


Mobile App Offline Mode Active

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).

Not Supported in Offline Mode:

- Patients
- Unscheduled Visits
- Sign up
- Forgot Password
- Change Password
- Change Language
- Change Agencies



Mobile App Network Notice

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 HHAX system once Internet connectivity is restored.
4. When Offline Mode is enabled, 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

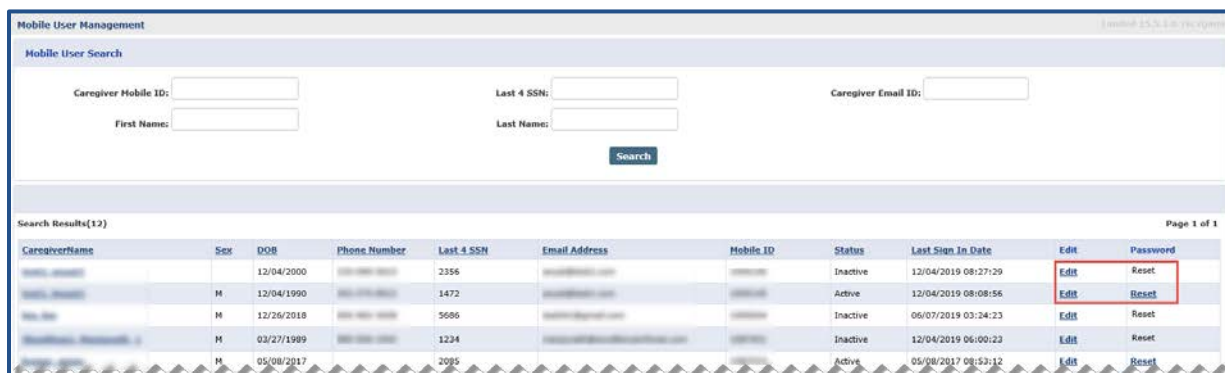
Because credentials cannot be authenticated with the HHAX system when offline, the Mobile App securely stores the last known credentials on the mobile device for the Caregiver to log in when in Offline Mode. The user is allowed up to 3 attempts to login before they are prompted to wait 3 minutes to retry.

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 and only pertains to the information provided by the Caregiver when they register for an account via the Mobile App or Caregiver Portal.

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 *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

Mobile User Search

Caregiver Mobile ID: Last 4 SSN: Caregiver Email ID:

First Name: Last Name:

[Search](#)

Search Results(12) Page 1 of 1

CaregiverName	Sex	DOB	Phone Number	Last 4 SSN	Email Address	Mobile ID	Status	Last Sign In Date	Edit	Password
pradip, pradip		12/04/2000	555-555-5555	2356	pradip@hhax.com	123456	Inactive	12/04/2019 08:27:29	Edit	Reset
pradip, pradip	M	12/04/1990	555-555-5555	1472	pradip@hhax.com	123456	Active	12/04/2019 08:08:56	Edit	Reset
pradip, pradip	M	12/26/2018	555-555-5555	5686	pradip@hhax.com	123456	Inactive	06/07/2019 03:24:23	Edit	Reset
pradip, pradip	M	02/27/1989	555-555-5555	1224	pradip@hhax.com	123456	Inactive	12/04/2019 06:00:23	Edit	Reset
pradip, pradip	M	05/08/2017	555-555-5555	2085	pradip@hhax.com	123456	Active	05/08/2017 08:53:12	Edit	Reset

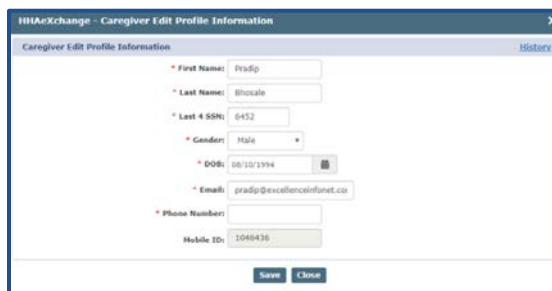
Mobile User Management

A Mobile User must have an **Active Status** for the [Edit](#) and [Reset](#) links to be available. Only an Admin role has permissions to perform these functions.

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

To edit information on the Mobile User Management page, click the [Edit](#) link on the applicable User row.

The *Caregiver Edit Profile Information* window opens. Make the applicable edits and click **Save** to finalize.



HHAXchange - Caregiver Edit Profile Information

Caregiver Edit Profile Information

* First Name: pradip

* Last Name: Bhosale

* Last 4 SSN: 5452

* Gender: Male

* DOB: 08/10/1994

* Email: pradip@excellenceninet.com

* Phone Number:

Mobile ID: 1040436

[Save](#) [Close](#)

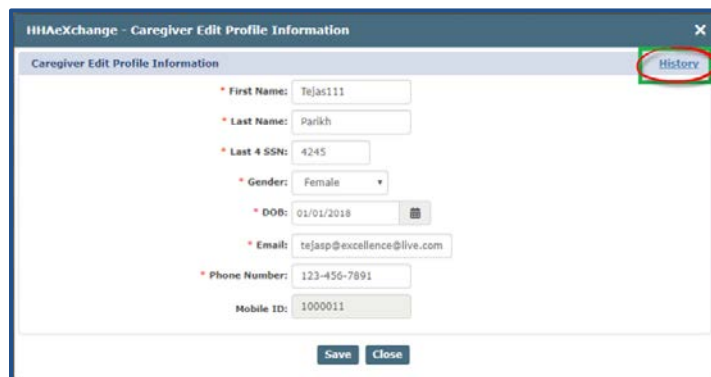
Caregiver Edit Profile Information Window



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.

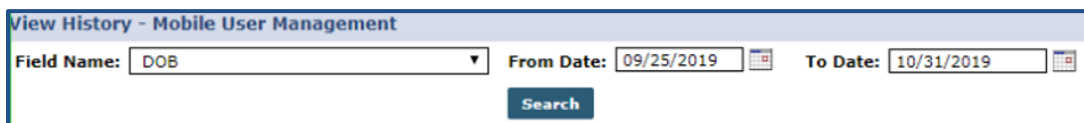
Mobile User Management - History

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



Caregiver Edit 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.



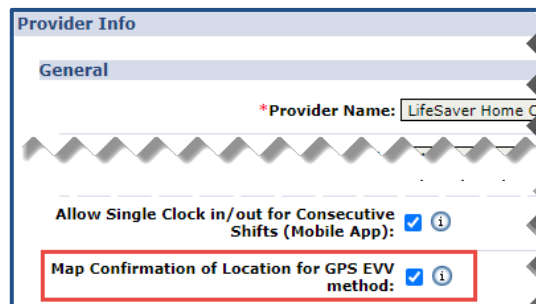
Mobile User Management – View History

GPS EVV Method Enhancement to Reduce OOR Exceptions

To reduce the number of *Out Of Range* (OOR) exceptions on the Call Dashboard, the Mobile App has been updated to provide guidance to a Caregiver using the GPS EVV method. With this enhancement, 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 Mobile App can now provide guidance to move closer to the Patient to be within the established tolerance range.

To enable this feature, navigate to the *Provider Info* page (**Admin > Provider Info**). On the *General* section, select the **Map Confirmation of Location for GPS EVV Method** checkbox.

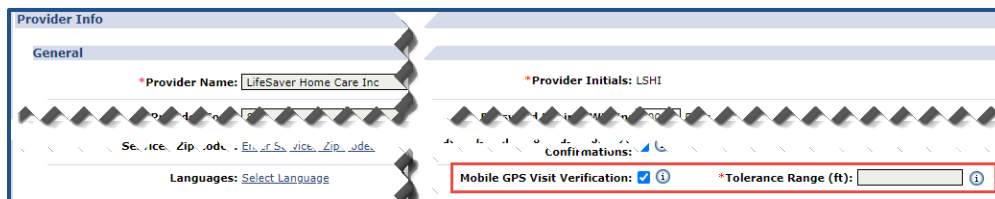
Note: Selecting this option enables the feature for all mobile-enabled Caregivers.



The screenshot shows the 'Provider Info' page with the 'General' tab selected. The 'Provider Name' is 'LifeSaver Home Care Inc'. Below this, there are two checkboxes: 'Allow Single Clock in/out for Consecutive Shifts (Mobile App):' which is checked, and 'Map Confirmation of Location for GPS EVV method:' which is also checked. The second checkbox is highlighted with a red rectangle.

Provider Info: Map Confirmation Setting

In the same *General* section, ensure to that the **Mobile GPS Visit Verification** checkbox is selected. The **Tolerance Range** settings are read-only for Providers (defined by HHAX).



The screenshot shows the 'Provider Info' page with the 'General' tab selected. The 'Provider Name' is 'LifeSaver Home Care Inc' and the 'Provider Initials' are 'LSHI'. Below these, there are two checkboxes: 'Mobile GPS Visit Verification:' which is checked, and 'Tolerance Range (ft):' which is a read-only field. The first checkbox is highlighted with a red rectangle.

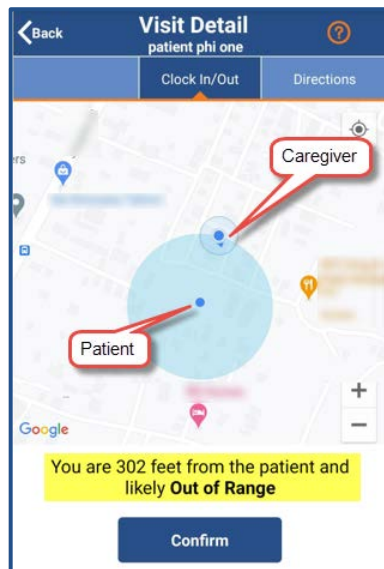
Provider Info: Mobile GPS Visit Verification Tolerance Range

On the Mobile App

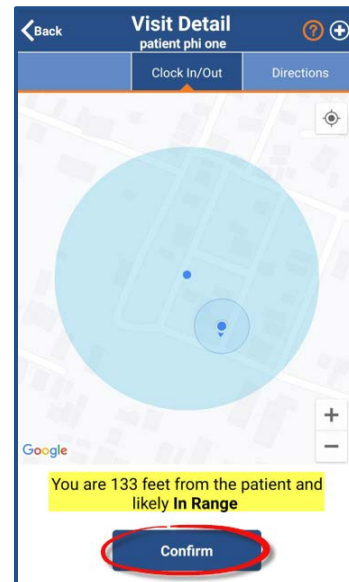
Once the feature is enabled, a Caregiver using the GPS EVV method, is presented with a real-time map location relative to the Patient address. This helps them evaluate and approximate to “In Range” coordinates before confirming a Clock-In or Clock Out.

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 HHAX; capped at 1,000 feet). Guidance is provided below the map assisting with proximity.

The image on the left indicates that the Caregiver is likely **Out of Range** while the image on the right illustrates the Caregiver closer to the Patient and **In Range**. Once **In Range**, the Caregiver can click on the **Confirm** button to capture the EVV.



Mobile App: Out of Range



Mobile App: In Range