



Caregiver Mobile App Process Guide (Providers)

Caregiver Setup and Use

Document Revision History

Date	Description of Revision
11/29/2018	Initial version of the document
01/13/2020	Added Mobile Offline Mode
10/26/2020	Added GPS EVV Method Enhancement to Reduce OOR Exceptions
01/14/2021	Update: Direction Map on Visit Details Screen Update: Language Selector Added: Multiple Language Support for Sign Up Process Added: Warning for Inadvertent Unscheduled Visits

Table of Contents

Overview	1
Caregiver Mobile App	2
Downloading the App	2
Signing Up and Registering	3
Sign Up	3
Register	4
Using the Mobile App	6
The Main Screen	6
Top Panel (1)	6
Today's Schedule (2)	6
Unscheduled Visits (3).....	7
Visits (4).....	8
Patients (5)	9
Clocking IN and OUT	10
Additional Features.....	13
Settings and User Agreement	13
User Guide	13
Patient Search	14
Language Options	14
Mobile App Offline Mode	16
Caregiver Mobile App	16
Caveats.....	17
Offline Authentication	17
GPS EVV Method Enhancement to Reduce OOR Exceptions	18
Updates to the Visit Details > Direction Map	19

Overview

The **HHAX Mobile App** is a tool used to place EVVs, review Patient and Visit information. The HHAX Mobile App is available for both iPhone and Android users. This process guide covers the Caregiver Mobile App functionality and setup in the HHAeXchange (HHAX) system as well as functionality on the Caregiver's device.

Please direct any questions, thoughts, or concerns regarding the content herein to [HHAeXchange Customer Support](#). Refer to the **Help** section in the Mobile App for immediate questions or click the link to contact support for further assistance.

HHAX System Key Terms and Definitions

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

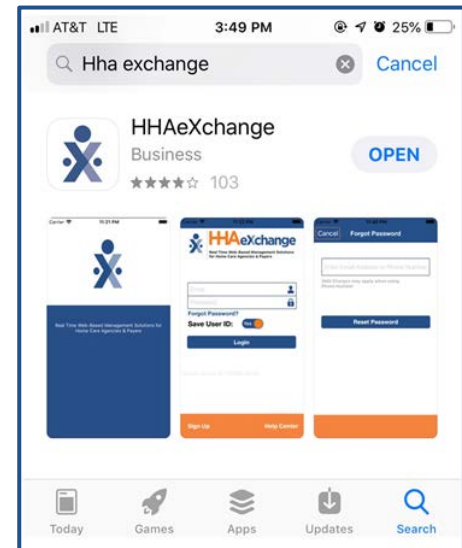
Term	Definition
Patient	Refers to the Member, Consumer, or Recipient. The Member is the person receiving services.
Caregiver	Refers to the Aide, Homecare Aide, Homecare Worker, or Worker. The Caregiver is the person providing services.
Provider	Refers to the Agency or organization coordinating services.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

Caregiver Mobile App

Downloading the App

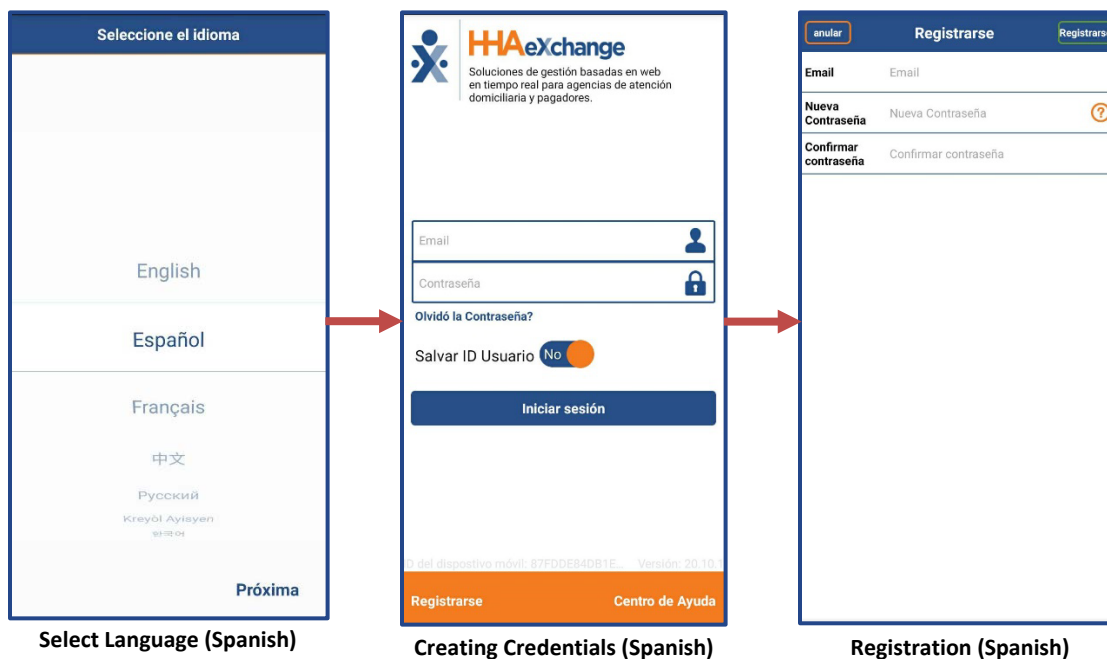
The HHAExchange Mobile App is available for download through the App Store or Google Play. The App is available for both iPhone and Android devices. To locate and download the App, enter the keyword **HHA Exchange** in the search bar of the App Store or Google Play (illustrated in the image).

Caregivers are responsible for downloading and installing the application on their personal mobile device. Once registered, Caregivers must provide credentials as well as ID numbers to the Agency for further setup and linking to the HHAX system.



HHAExchange Mobile App

When the Mobile App is first installed, the user is prompted to select the preferred language. The language selected for the signup process is also the language in which guidance and emails are presented.



Signing Up and Registering

Creating an account for the Mobile App is a two-step process, as follows:

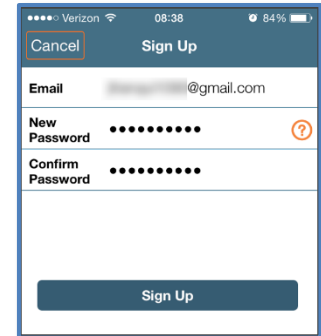
1. **Sign up** by creating login credentials.
2. **Register** by entering additional demographic information.

Sign Up

Once the App has downloaded, press **Sign Up** on the bottom left of the main screen. The App prompts for the following:

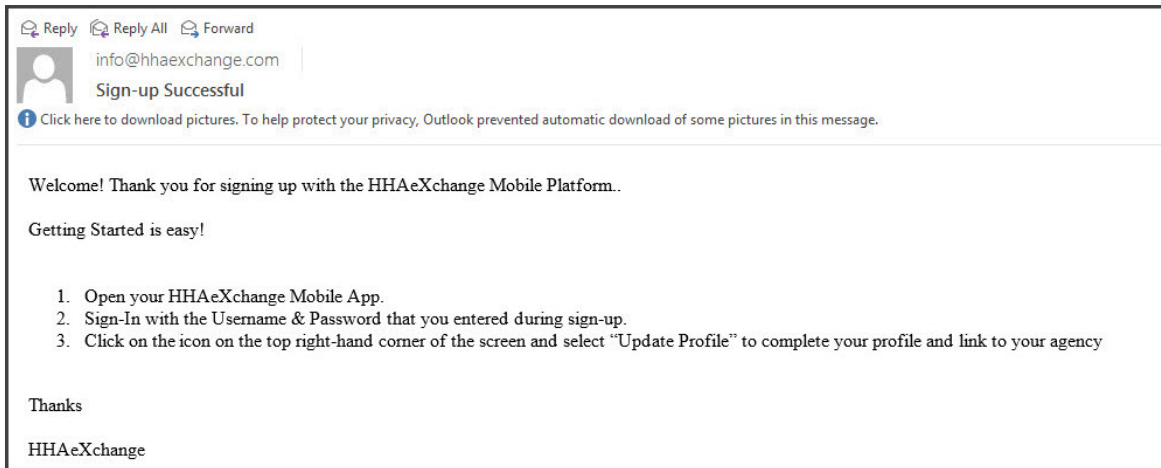
- An **Email Address**
- A **Password** (minimum of 8 letters, 1 capital, and 1 numeric value)

Once credentials are completed and confirmed, select **Sign Up** to log in to the App.



Sign Up Screen

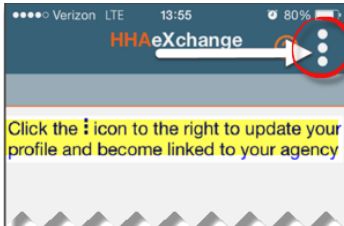
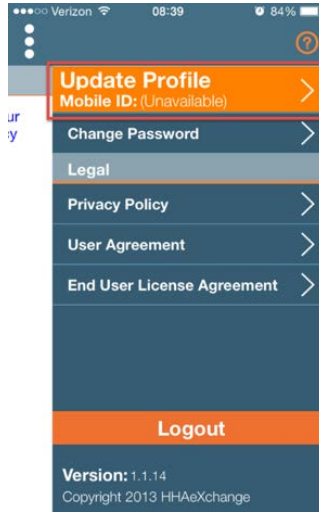
Upon successfully creating an account, the system issues a verification email:

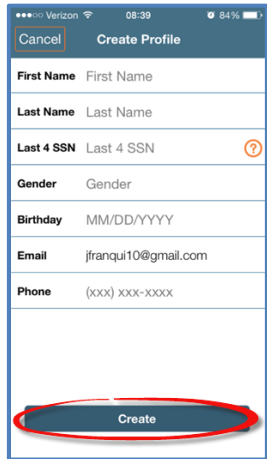
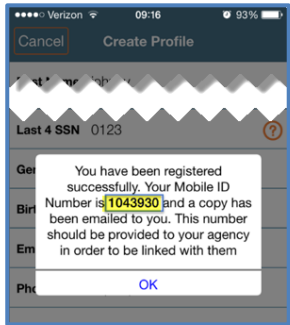


Successful Sign Up Email

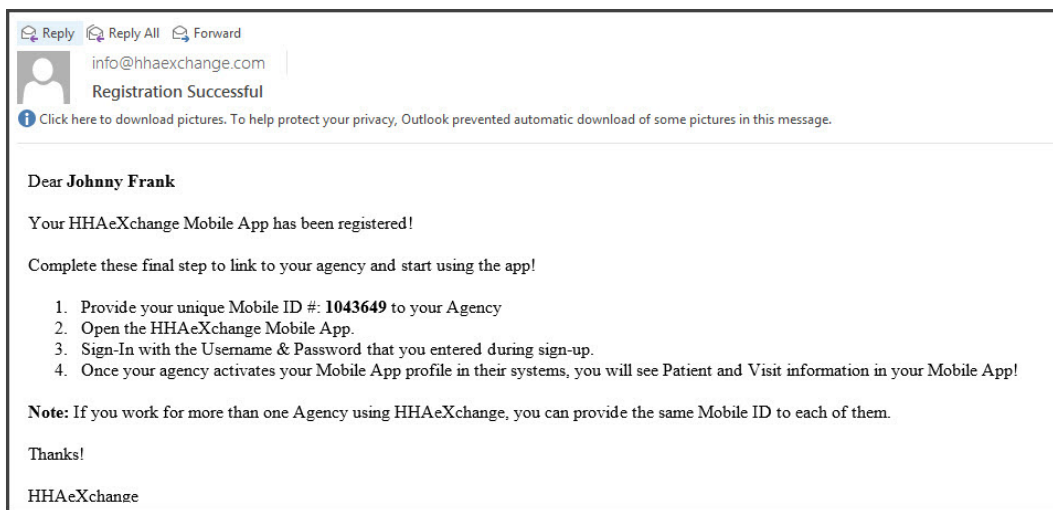
Register

Follow the steps outlined below to register on the HHAX Mobile App.

Step	Action
1	Log in to the App upon receiving the verification email.
2	Review the <i>Terms of User Agreement</i> and select the Agree button.
3	The Main Screen opens. Click the three-dot icon (on the top-right corner) as prompted by the message. Select the Update Profile option.  

Step	Action
4	Complete all the fields on the Create Profile page. Click the Create button to create the Profile. Note: Values must match the information on record in HHAX. The Mobile App does not link correctly if any of these values do not match. 
5	If all the information is entered correctly, a message appears containing the Mobile ID. 

The HHAX system sends a second email after successful registration. This message contains the **Mobile ID** as well as instructions on how to log in and use the Mobile App:



Successful Registration Email

Using the Mobile App

The Main Screen

Via the Mobile App Caregivers keep track of their schedule and Clock-IN and OUT of a Visit.

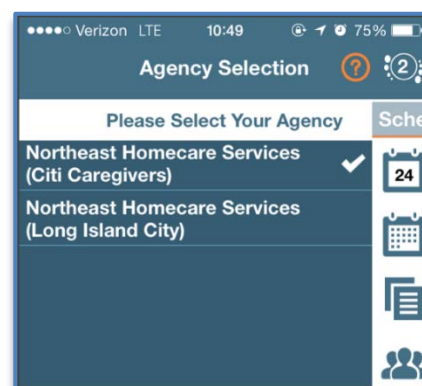
The following sections provide descriptions and guidance on the various options on the Main Screen.



The Main Screen

Top Panel (1)

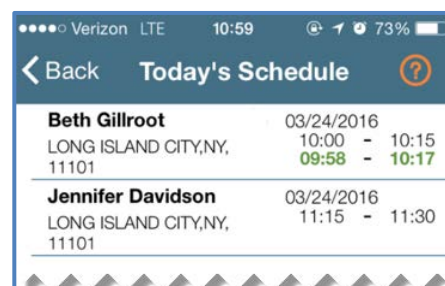
Clicking on the icon on the top panel to switch between Agencies/Offices the Caregiver is connected to. The Caregiver must provide every Agency/Office the **Mobile ID** for proper syncing/linking with the system.



Switch Offices

Today's Schedule (2)

Today's Schedule is used to review and Clock In and Out of scheduled Visits for the present day.



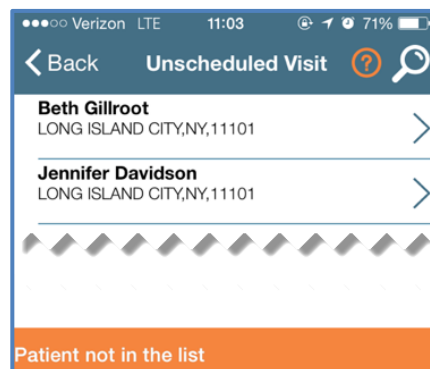
Today's Schedule

Unscheduled Visits (3)

Unscheduled Visits allows Caregivers to submit EVV for unscheduled Visits. Caregivers create an unscheduled Visit for any Patient for which they have access to by selecting the Patient Profile.

Select **Patient not in the list** to create a new Visit if asked to provide service for a Patient a Caregiver has never worked with before.

EVV for an Unscheduled Visit generated via the **Patient not in the list** selection is automatically sent to **Call Maintenance** with the status “Unscheduled – Patient not Selected”; EVV cannot be linked because EVV is meant to provide proof to the Agency/Office that Caregivers were with the Patient.



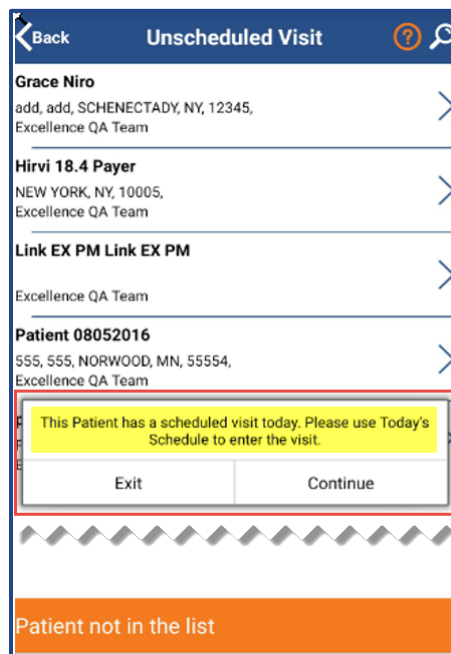
Create Unscheduled Visits

Note: Placing EVV and logging POCs for Unscheduled Visits follows the same process as Scheduled Visits.

Warning for Inadvertent Unscheduled Visits

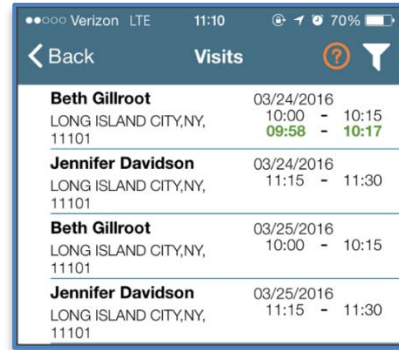
If a Caregiver attempts to create an **Unscheduled Visit** and there is a scheduled visit for that same Patient on the same day, then the Caregiver receives a warning message guiding the Caregiver to use the visit under Today's Schedule.

The purpose of this alert is to prevent duplication of visits on the Call Dashboard and Missed Visit scenarios.



Visits (4)

Select **Visits** to review all scheduled Visits up to two weeks in advance.

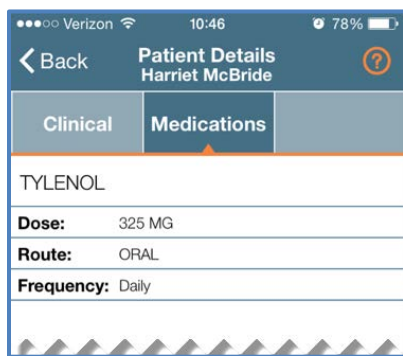


Provider	Location	Date	Time
Beth Gillroot	LONG ISLAND CITY, NY, 11101	03/24/2016	10:00 - 10:15
Jennifer Davidson	LONG ISLAND CITY, NY, 11101	03/24/2016	11:15 - 11:30
Beth Gillroot	LONG ISLAND CITY, NY, 11101	03/25/2016	10:00 - 10:15
Jennifer Davidson	LONG ISLAND CITY, NY, 11101	03/25/2016	11:15 - 11:30

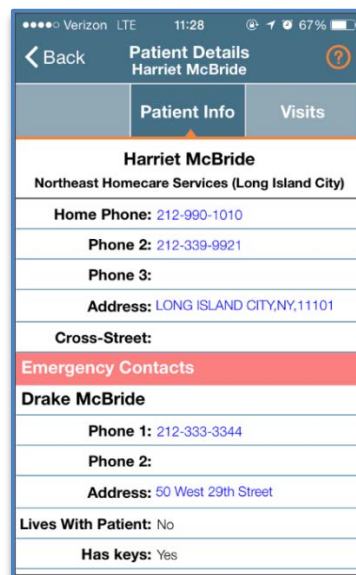
Completed and Scheduled Visits

Patients (5)

Select **Patients** to view a list of all the Patients the Caregiver has access to. Select a Patient to view Patient Info and Visits.



Patient Details: Medicaitons



Patient Details: Info

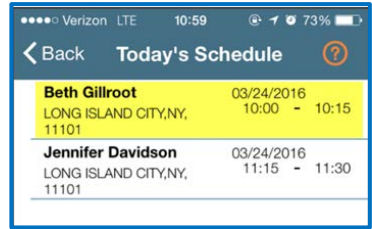
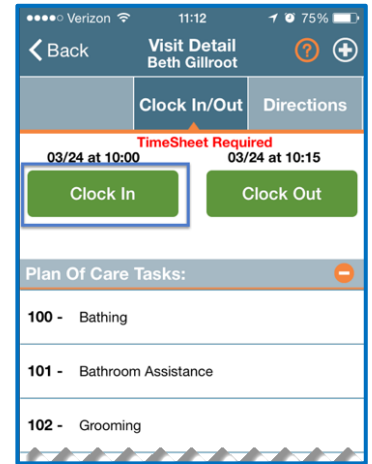
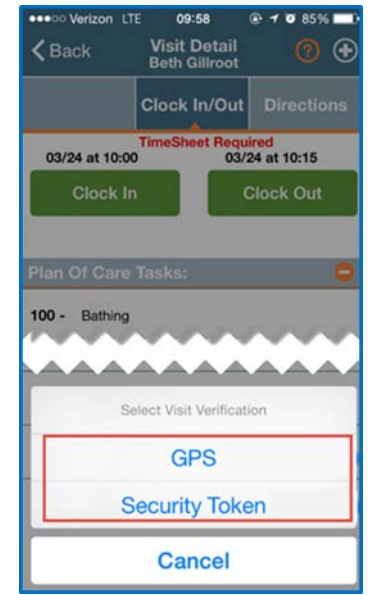
Multiple Addresses appear in the Patient Infor tab if/as entered in the Patient Profile page (as illustrated in the image).

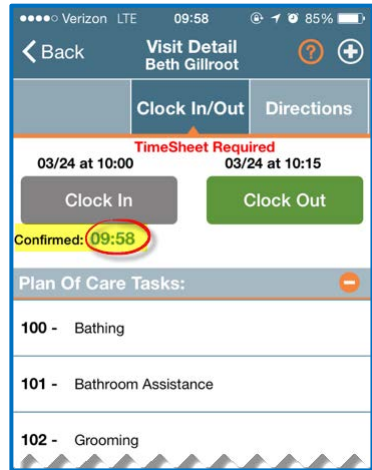
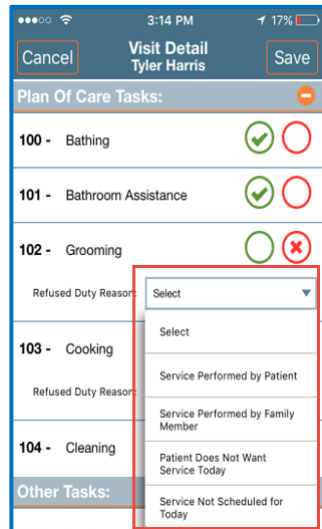


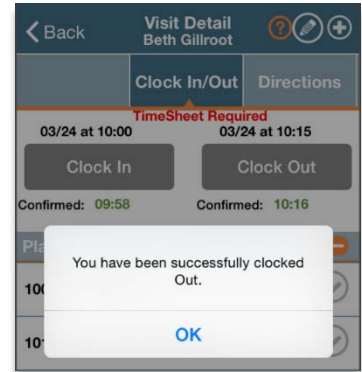
Patient Multi-Address

Clocking IN and OUT

This section provides the steps involved when Clocking IN and OUT of a Visit, as well as entering POC Duties.

Step	Action
1	Select Today's Schedule from the Main Screen. Select the appropriate Visit. For example, Beth Gillroot. 
2	Upon selecting the Patient, the Clock-In/Out tab of the Visit Details page opens. Click on the Clock In button.  Clock In/Out Tab
3	Select either GPS or Security Token to submit an EVV. Note: The term Security Token refers to the FOB Device. 

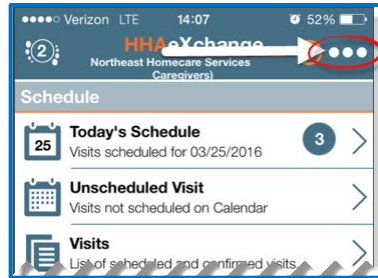
Step	Action								
4	A successful EVV displays in green under the Clock In button (now grey), as illustrated in the image. Note: Unsuccessful EVV placement times display in red instead of green.  Successful EVV								
5	From the Visit Detail page, Caregivers can also access the following: <table border="1"> <thead> <tr> <th>Options (Tab)</th><th>Description</th></tr> </thead> <tbody> <tr> <td>Directions tab</td><td>Syncs to the mobile device's GPS to provide directions to the Visit location.</td></tr> <tr> <td>Patient Info tab</td><td>Displays the Patient's name, any phone numbers connected to the profile, their address, and emergency contacts.</td></tr> <tr> <td>Care Plan tab</td><td>This page contains the Patient's POC listing each duty in detail, describing how often it is required along with additional instructions.</td></tr> </tbody> </table>	Options (Tab)	Description	Directions tab	Syncs to the mobile device's GPS to provide directions to the Visit location.	Patient Info tab	Displays the Patient's name, any phone numbers connected to the profile, their address, and emergency contacts.	Care Plan tab	This page contains the Patient's POC listing each duty in detail, describing how often it is required along with additional instructions.
Options (Tab)	Description								
Directions tab	Syncs to the mobile device's GPS to provide directions to the Visit location.								
Patient Info tab	Displays the Patient's name, any phone numbers connected to the profile, their address, and emergency contacts.								
Care Plan tab	This page contains the Patient's POC listing each duty in detail, describing how often it is required along with additional instructions.								
6	When the Visit is completed, click the green Clock Out button on the Clock In/Out page. If the Visit included a Plan of Care (POC), the Caregiver is prompted to select the duties performed. Select the green circle (checkmark) for duties performed or the red circle (x) for duties refused. In addition, select the Refused Duty Reason if the Agency uses (requires) the functionality when a duty is marked refused. Note: When servicing Mutual Patients, the Caregiver must enter separate POC duties for each Patient.  Enter POC Duties								

Step	Action
7	Click Save once the required screens are completed. Doing so routes the user back to the Visit Details page with a confirmation message (as shown in the image). Click OK to return to the home screen.  Clock Out Confirmation

Additional Features

Settings and User Agreement

On the Main screen, select the Settings icon (3-dots) to access additional features such as: password change, see which Agencies/Offices are linked to the Mobile Device ID, unlink from an Agency/Office, and review User Agreement terms.



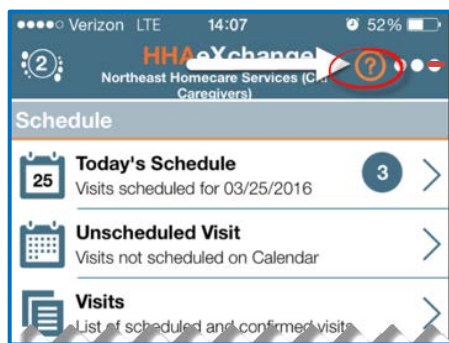
Settings Icon on the Main Screen



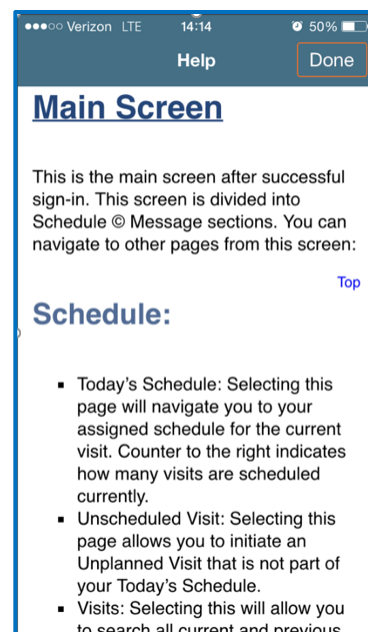
Settings Menu

User Guide

Click the **Help** icon (orange question mark) to access the Mobile App user guide at any time.



Settings Icon on the Main Screen

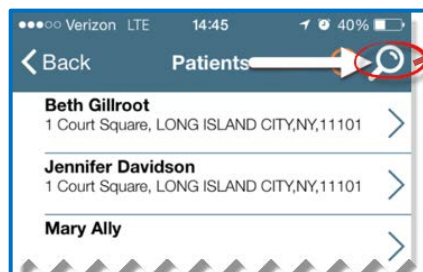


Help Guide

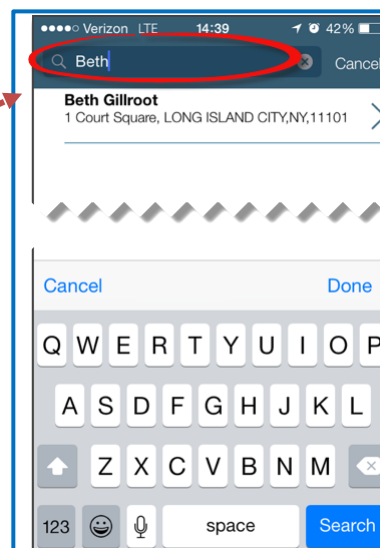
Patient Search

Caregivers can search for Patients they have access to or have previously provided service for.

On the **Patients** page, click the Search icon (magnifying glass) to open the search bar prompting the entry of either a Patient's Name or their Address.



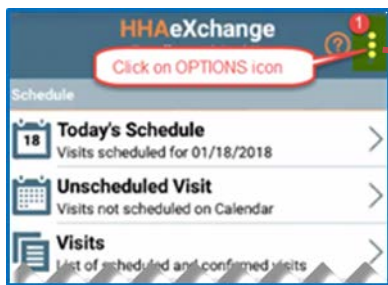
Search Icon on the Patient Page

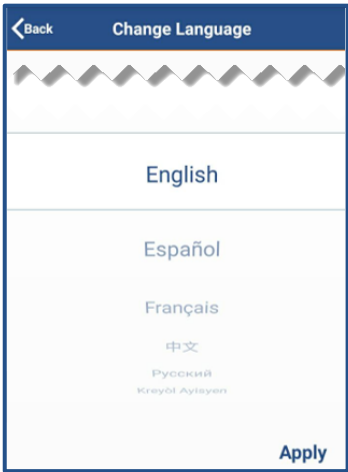


Patient Search

Language Options

The Mobile App offers language options designed to accommodate Caregivers with their preferred language when using their mobile device. The following table provides instructions on how to change language settings.

Step	Action
1	Click on the Options icon on the top-right, as illustrated in the image. From the list of options, select Change Language.  
2	From the list of available languages, thumb-scroll to select the desired language. Once selected click on Apply (at the bottom of the screen) to save the language of choice. Once selected, the screens (headers, instructions, etc.) have been translated into the selected language facilitating recognition of the chosen language.

Step	Action
	  Existing languages include: - English (North America) - Spanish (Latin America) - French (European) - Chinese (Traditional) - Russian - Haitian Creole - Korean - Albanian - Arabic - Armenian - Bengali - Polish - Uzbek - Vietnamese Note: Other languages may be added in future releases. Scroll to locate other language (for example, English) on the device.
3	Upon selecting the preferred language option, all menu items appear in the chosen language. In this case, Spanish was the selected language. Note: To see Map functionality displayed in the selected language, users must first change the language, then <u>restart</u> the application to view those changes.  Language Applied

Mobile App Offline Mode



Agency must be configured for this feature to be available.

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.

Caregiver Mobile App

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

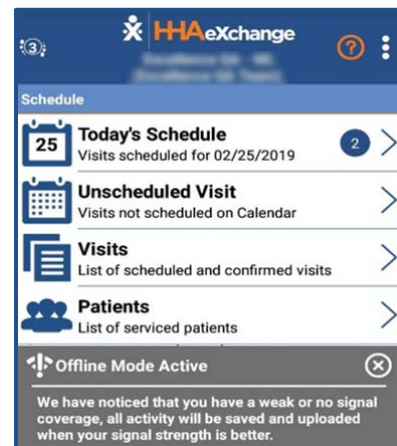
- Logging In
- Switching Agencies
- Changing Languages

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

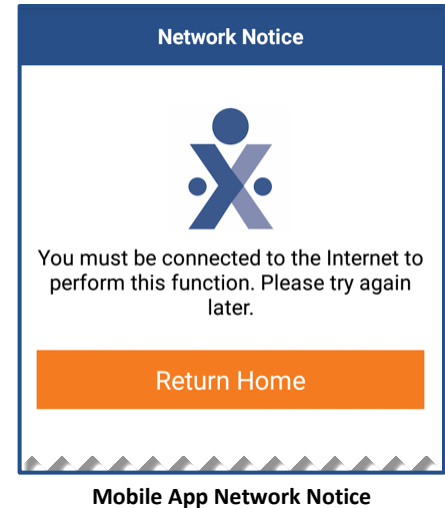


Mobile App Offline Mode Active

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



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**.

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.

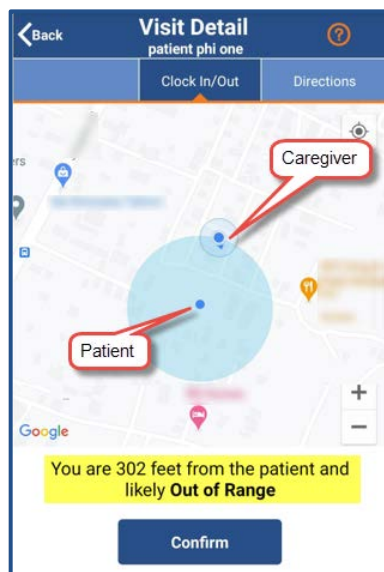
GPS EVV Method Enhancement to Reduce OOR Exceptions

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.

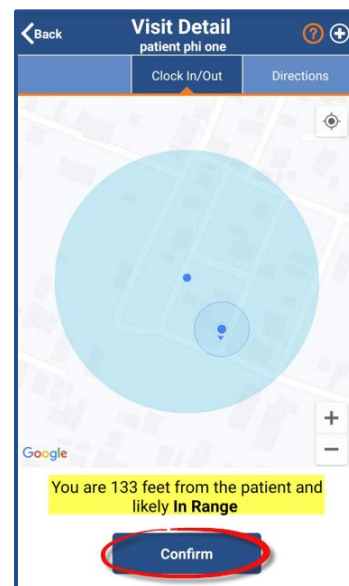
Once the feature is enabled by the Agency, a Caregiver using the GPS EVV method, is presented with a real-time map location relative to the Patient address. This helps them evaluate and approximate to “In Range” coordinates before confirming a Clock-In or Clock Out.

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.



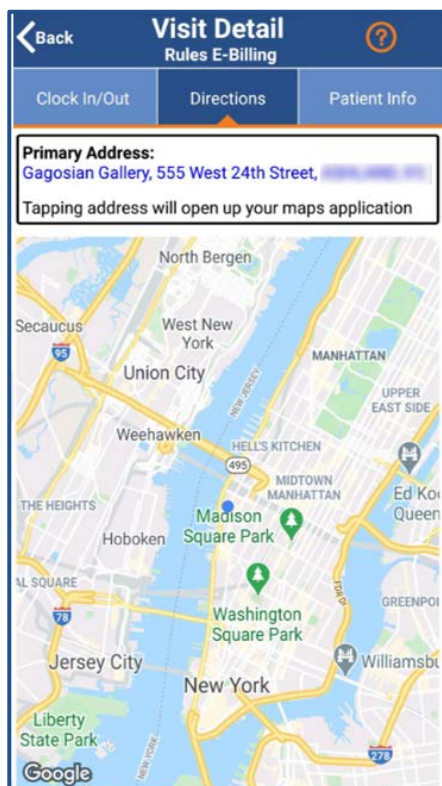
Mobile App: Out of Range



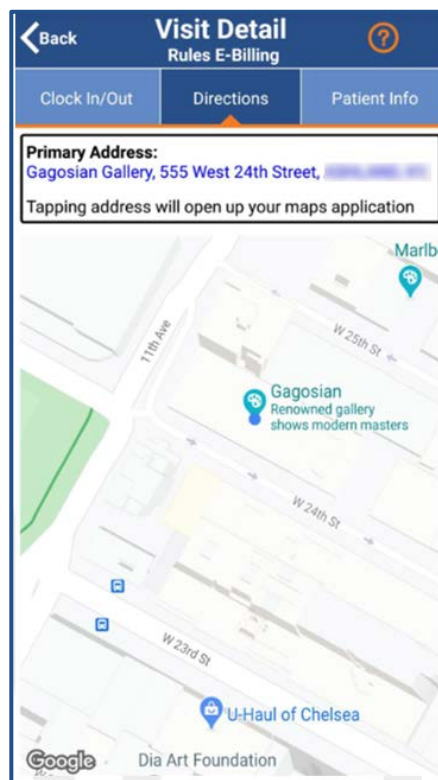
Mobile App: In Range

Updates to the Visit Details > Direction Map

The **Directions** map (**Visit Details > Directions**) has been updated to display a 5-mile wide view with a blue dot marking the exact **Patient Address**. Pinch-in to zoom out and/or pinch-out to zoom in. The map also displays transportation routes and nearby buildings.



Directions Map: Zoom Out



Transportation Routes: Zoom In