

# Our Webinar Will Begin Shortly

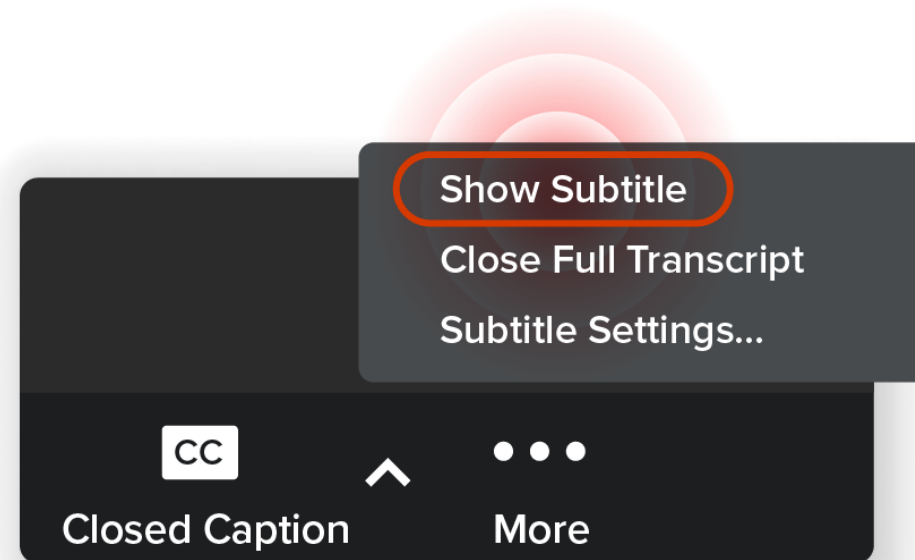
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- Q&A at the end. Please submit your questions in the Q&A box.
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- Please proceed by selecting the Closed Caption option at the bottom of your screen to enable feature.



## Meet the Trainer!



Ashley Cho



- **Role:** Sr. Training Specialist
- **Tenure at HHAeXchange:** 4 years
- **Areas of Expertise:** Billing and Revenue Cycle
- **Fun Fact:** I am Team Hufflepuff

Teavy Leonardson



- **Role:** Sr. Training Specialist
- **Tenure at HHAeXchange:** 3 years
- **Areas of Expertise:** Implementation, Clinical, State Sponsored Trainings
- **Fun Fact:** I am currently re-bingeing on Harry Potter Series. #TeamSlytherin

# EVV Made Simple: How to Stay Compliant Every Day

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# Overview



This webinar provides a practical overview of EVV compliance in HHAeXchange, focusing on how visits are captured, verified, and maintained to support daily compliance. Participants will learn how EVV fits into the full visit lifecycle, why visits become non-compliant, and how to prevent common EVV issues before they impact operations.

## **Who should take this training?**

Agency staff responsible for managing caregiver visits and EVV accuracy, including:

- Coordinators and schedulers
- Administrators and supervisors
- EVV compliance and oversight staff

# Objectives of Today's Training

## You will be able to:

- Record visits accurately using EVV tools such as the Mobile App, Offline Mode, and IVR
- Identify and resolve common EVV exceptions using Visit Maintenance
- Understand how EVV accuracy affects prebilling and billing workflows
- Run EVV compliance and visit reports to monitor performance



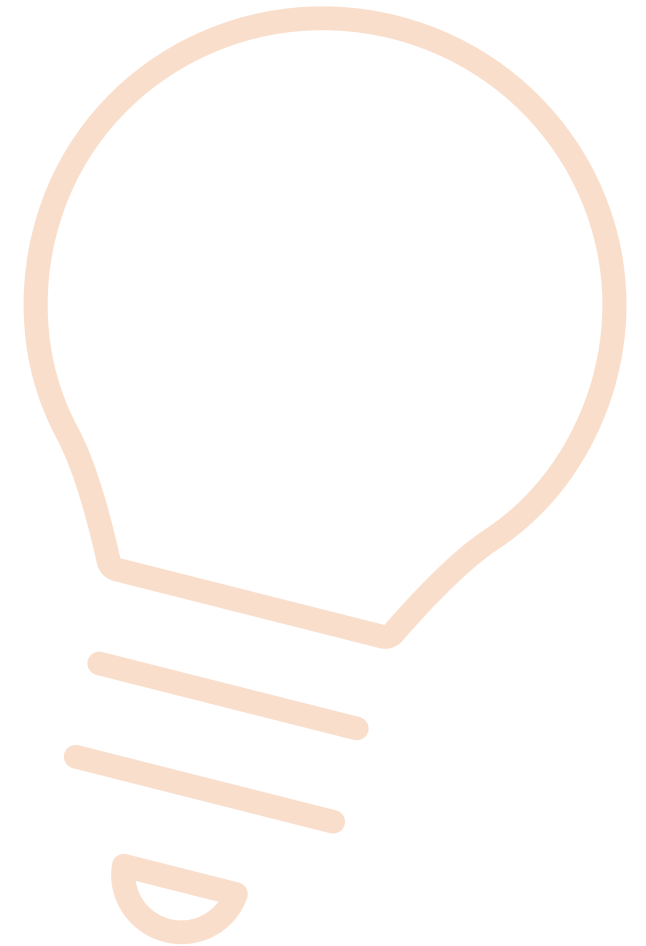


## Poll - Ice Breaker



**How familiar are you with EVV workflows in HHAeXchange?**

- A. I'm brand new to EVV
- B. I know the basics but want more confidence
- C. I work with EVV regularly
- D. I'm very comfortable with EVV workflows





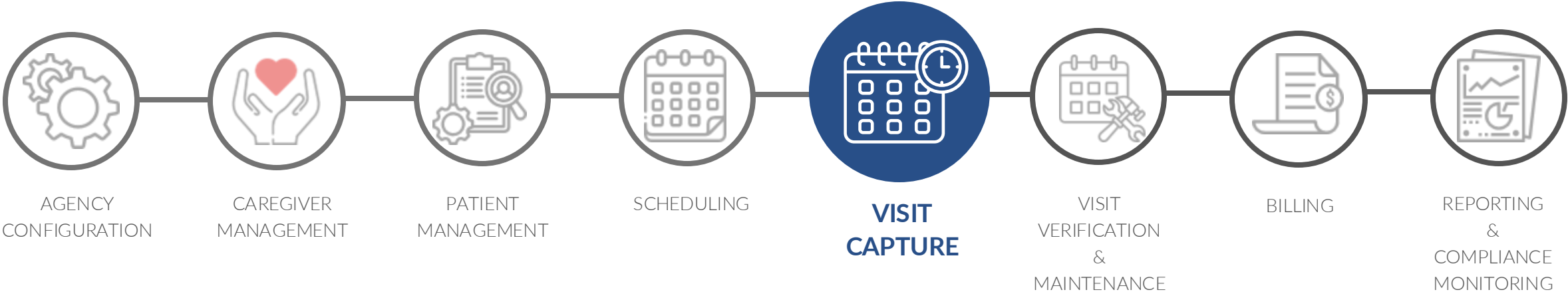
# Agenda

- EVV Overview
- EVV Tools & Visit Capture
- Visit Verification & Maintenance
- Reports & Compliance Monitoring
- Key Takeaways
- Resources
- Q&A

# EVV Overview

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# EVV Tracker



# 6 Elements of a Cures Compliant Visit



**Who**

Patient



**Who**

Caregiver



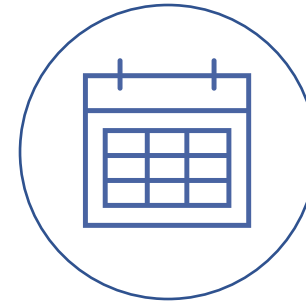
**What**

Type of  
Service



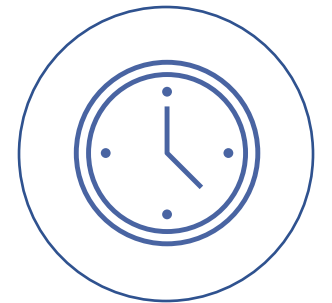
**Where**

Location  
of  
Service



**When**

Date of  
Service



**When**

Time of  
Service

# > What Makes a Visit Non-Compliant?



## What does “non-compliant” mean?

- A visit is considered non-compliant when required EVV information is missing, incorrect, or does not align with the visit.

## How does HHAExchange identify this?

- In HHAExchange, non-compliant visits are flagged as **EVV exceptions** so they can be reviewed and corrected.

## Why does this matter?

- Non-compliant visits can delay billing, require additional review, or lead to manual corrections if not resolved promptly.

# What Can Make a Visit Non-Compliant?



(Common EVV Exceptions in HHAeXchange)

- No EVV captured for a scheduled visit
- EVV location does not match the member's address
- Missing or incorrect clock-in or clock-out times
- EVV was not linked to the scheduled visit
- Visit was manually confirmed instead of captured electronically

# EVV Tools & Visit Capture

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# > EVV Capture Methods



## What is it?

- EVV capture methods are the approved ways caregivers record visit information electronically at the time services are provided.

## Why does it matter?





- Using approved EVV methods ensures visits are compliant, reduces exceptions, and minimizes manual corrections later.

## How do caregivers capture EVV?

- **Mobile App** – Clock in and out using a smartphone with GPS verification
  - **Offline Mode** – Capture EVV when there is no internet or cell service
- **IVR** – Clock in and out using a landline phone

# Visit Capture Methods



EVV Method	 HHAeXchange Mobile App	 IVR
GPS		
Patient's Landline Phone Number		

## Caregivers can capture visits using approved EVV methods in HHAeXchange.

- The HHAeXchange Mobile App allows caregivers to clock in and out electronically, even without internet using Offline Mode
- IVR allows caregivers to clock in and out using a landline phone when applicable
- Visits should be reviewed regularly to ensure EVV was captured and synced correctly
- Missed visits should be addressed promptly to avoid downstream issues

# > Mobile App Overview



## What is it?

- The HHAeXchange Mobile App allows caregivers to capture EVV by clocking in and out directly from their mobile device at the patient's location.

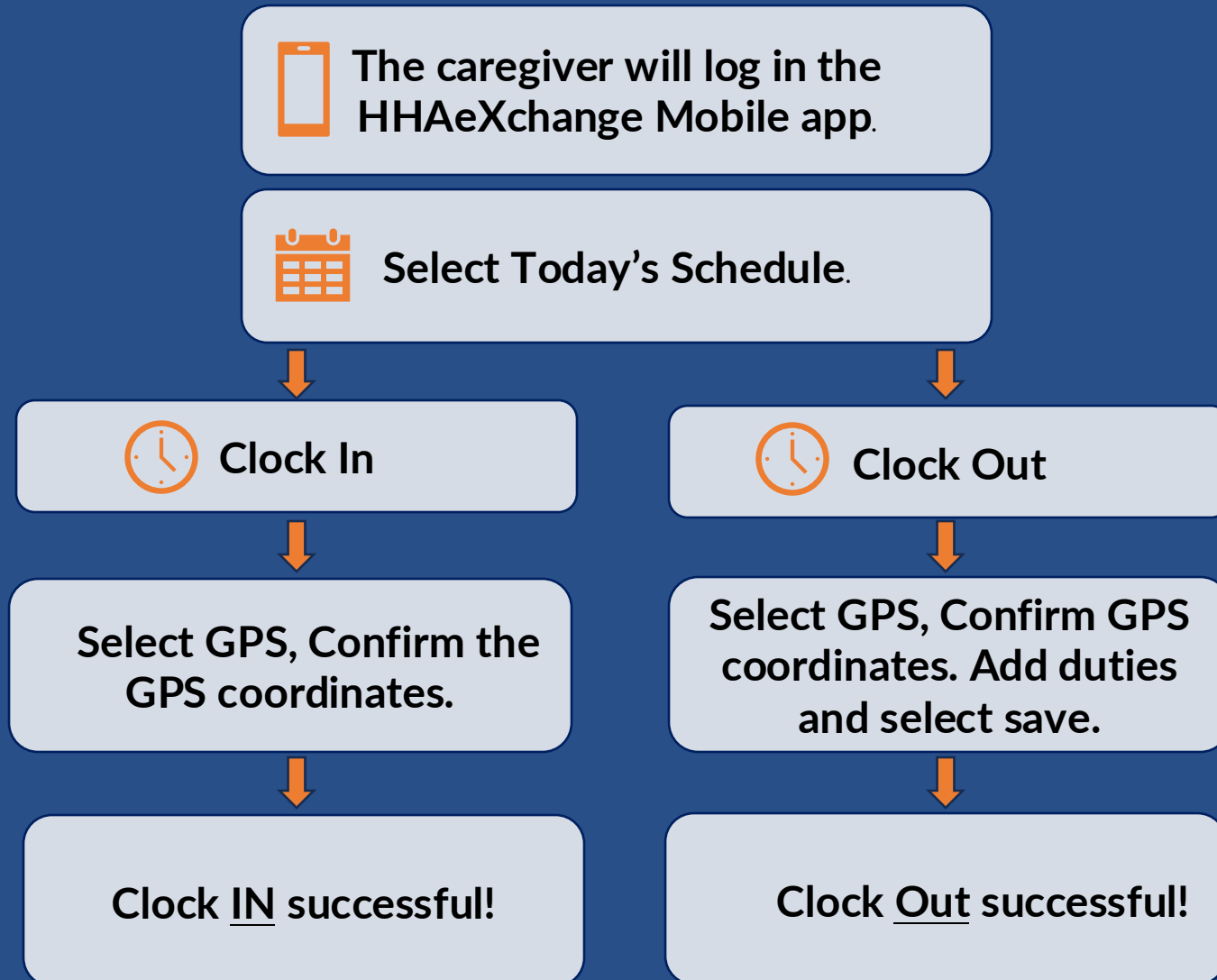
## Why does it matter?

- The mobile app is the primary EVV capture method and helps ensure visits are recorded accurately using time and location data, reducing exceptions and manual corrections.

## How is it used?

- Caregivers **log into** the HHAeXchange Mobile App
- Select the **scheduled visit** from their calendar
- **Clock in and clock out** at the start and end of the visit
- Location services capture **GPS** data during the visit
- **Offline Mode** automatically captures EVV if internet or signal is unavailable

# ▶ HHAEExchange Mobile App



10:03



App Store



HHAExchange+



Zoom



HHAExchange



Search



# Mobile App Best Practices



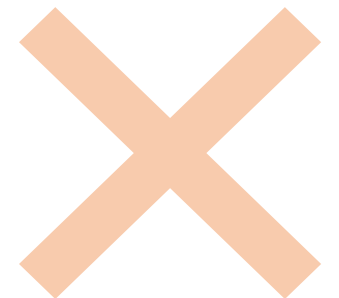
## Compliant Use

- Clocking in/out at the patient's location
- GPS matches the address
- Correct Mobile ID and profile setup
- Offline Mode used when needed
- Visit captured electronically



## Non-Compliant Use

- Clocking in/out away from the patient's location
- GPS mismatch
- Missed clock-out with office edits
- Mobile ID or app setup issues
- Manual visit confirmation



# > Offline Mode Overview



## What is it?

- Offline Mode allows caregivers to capture EVV using the Mobile App when there is no to low internet or cell service.

## Why does it matter?

- Offline Mode prevents missed EVV, reduces manual visits, and helps maintain compliance in low-connectivity areas.

## How is it used?

- **Automatically activates** when the device has no signal or internet
- Caregivers use their **Offline PIN** to clock in and out
- **EVV data syncs** automatically once connectivity is restored
- **Offline PIN** can be managed in the Mobile App settings

# Offline Mode



## USING THE MOBILE APP IN OFFLINE MODE

Stay on track even with no signal - here's what you can do in Offline Mode.



### PREPARE BEFORE YOU LOSE SIGNAL

1



Log in to the mobile app while you still have internet so it can load your visit and patient information.

2



Once you're in an area with poor signal, turn off your cellular data to enable offline mode.

3



Log in to the mobile app. Make sure you see the "Offline Mode Active" message.

All other app features are unavailable until you're back online.



### ONCE LOGGED IN, AVAILABLE ACTIONS FROM TODAY'S SCHEDULE OR UNSCHEDULED VISIT SCREEN

1



Complete your visit tasks as usual (clock in/out, and/or enter duties).

2



The mobile app will upload everything once you're back online.



### GET BACK ONLINE TO SYNC YOUR WORK

1



Turn on your cellular network.

2



Open the mobile app and log in.

3



Offline activity will upload automatically once you're back online.

Your clock-ins/outs and duties are automatically saved and synced!



Need more help? Watch this video for more information on this feature!



[Knowledge Base: Offline Mode](#)



## What is it?

- IVR (Interactive Voice Response) allows caregivers to capture EVV by calling a designated phone number from the patient's landline.

## Why does it matter?

- IVR provides an alternative EVV capture method when mobile devices are not used and helps ensure visits are recorded electronically.

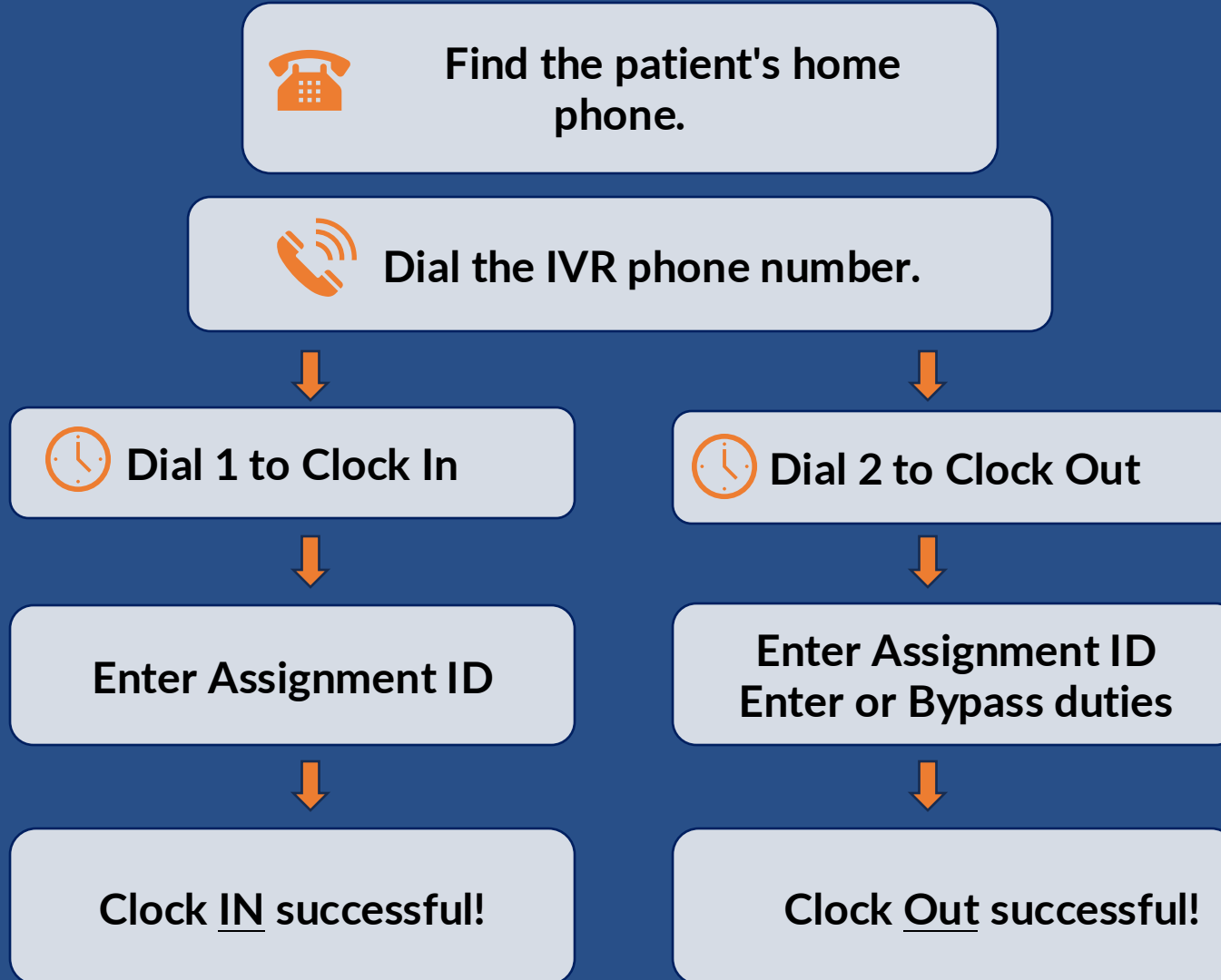
## How is it used?

- Caregivers call the agency's IVR number from the patient's landline
- Enter the required PIN or credentials when prompted
- Clock in and clock out by following voice prompts
- Complete or bypass duties as configured by the agency



# IVR Capture

Interactive Voice Response Number English & Spanish



# IVR Best Practices



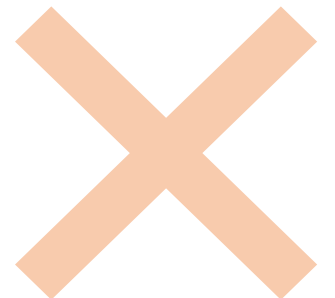
## Compliant Use

- Calling from the patient's assigned landline phone
- Using IVR only when IVR is the approved capture method
- Entering the correct caregiver PIN or credentials
- Clocking in and clocking out at the correct time
- IVR visit links successfully without manual edits



## Non-Compliant Use

- Calling from a phone that is not the patient's landline
- Using IVR when a Mobile App visit was required or available
- Entering an incorrect PIN or caregiver credentials
- Forgetting to clock out and asking the office to complete the visit
- IVR call does not match the scheduled visit time

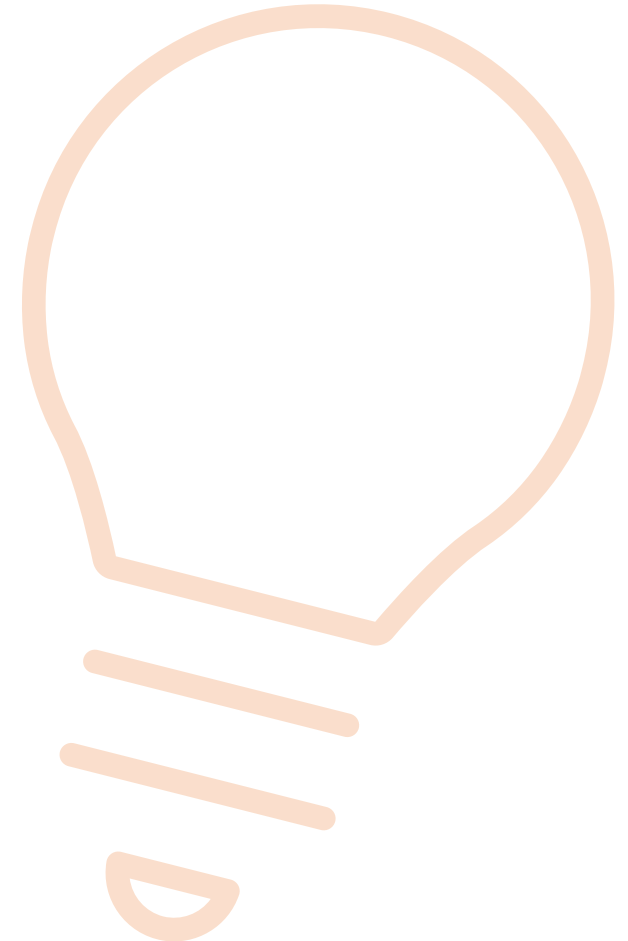


## Knowledge Check- Visit Capture



**Which Mobile app feature allows caregivers to capture visits when there is no internet or cell service?**

- A. IVR
- B. Calendar Note
- C. Manual Visit Entry
- D. Offline Mode**



# Visit Verification & Maintenance

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# > Visit Verification & Maintenance Overview



## What is it?

- Visit Verification & Maintenance is where agencies review completed visits, identify EVV exceptions, and make corrections when needed.

## Why does it matter?

- This step ensures visits are accurate, EVV-compliant, and ready for billing. It helps prevent duplicate visits, unnecessary manual edits, and billing delays.

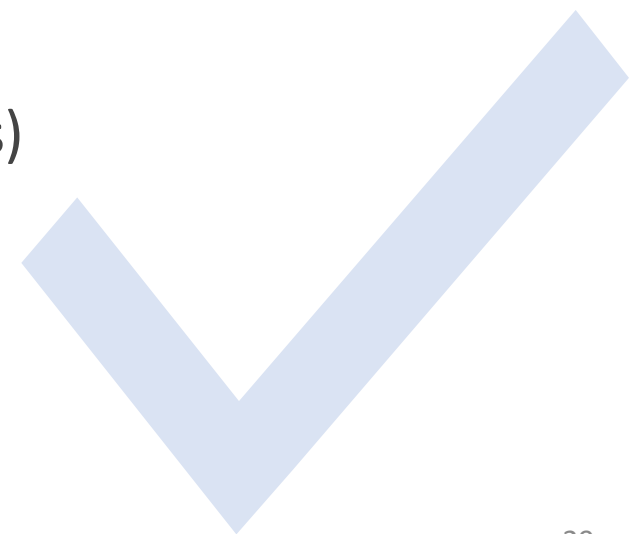
## How is it used?

- Agencies use the **Visit Maintenance** feature to review visit details, link EVV records, resolve exceptions, and confirm visits before they move forward in the workflow.



## How Do I Reduce Issues?

- ✓ Ensure visits are scheduled before care begins
- ✓ Confirm with caregivers the method of EVV
- ✓ Encourage consistent Mobile App or IVR use
- ✓ Confirm caregiver setup (Mobile ID, PIN, location services)
- ✓ Review and resolve exceptions early before Prebilling



# > VM Scenario 1: No Schedule on Calendar



**Scenario: A caregiver successfully captured EVV for a visit, but there is no scheduled visit on the patient's calendar for that date and time.**

## What is the issue?

- The EVV record exists, but it is not linked to a scheduled visit because the visit was not created on the calendar.

## Why does it matter?

- Without a scheduled visit, EVV cannot link correctly, causing an exception and preventing the visit from being compliant and billing-ready.

## How do you resolve it?

- Option 1 – **Link EVV to a Scheduled Visit**
- Option 2 – **Use Unscheduled Services**

# No Schedule on Calendar - 2 Resolution Options



**Scenario:** A caregiver successfully captured EVV for a visit, but there is no scheduled visit on the patient's calendar for that date and time.

## Option 1 – Link EVV to a Scheduled Visit

- **Create** or **update** the visit on the patient's calendar
- **Navigate** to Visit Maintenance
- **Locate** the visit with the exception
- **Link** the existing EVV record to the scheduled visit
- **Save** the changes

## Option 2 – Use Unscheduled Services

- **Navigate** to Visit Maintenance > Unscheduled Services > Search
- **Locate** the EVV entry you want to review
- **Hover** over the Suggested EVV Confirmation icon
- **Review** the suggested visit times in the Visit Time column
- **Select** Convert to Visit to create the scheduled visit
- Click **Save**

# VM Demo: No Schedule on Calendar



**HHAeXchange** Home Patient Caregiver **Visit** Action Billing Report Admin

**Visit Maintenance** Presentation last saved: Just now

Visits **Unscheduled Services** EVV Attempts

All fields marked with an asterisk (\*) are required.

Office \* UMA healthcare x UMA health care training x UMA MI office x

Date Range \* 04/01/2025 - 05/06/2025

Visit Status Select one or more

Visit Exceptions Select one or more

> Advanced Filters

**Search** Reset

---

**Visits** Legend: Auto-Linked | EW Exception | Manually entered time | Suggested EVV confirmation | Time requires manual entry [View All](#)

Office: UMA healthcare UMA health care training 1 more Date Range: 04/01/2025 - 05/06/2025 Visit Status: Completed Caregiver: Zidane, Barbara [KHC-1106]

Date/Schedule	Visit Time	Patient	Caregiver	Visit Status	Visit Exceptions	Auth/Bill Info	Actions
05/01/2025 (NS) 0h 30m	Start: 10:45 AM ⚠️ End: 11:00 AM ⚠️ Duration: 0h 15m	Grey, Lexie Admsn. ID: KHC-900103	Zidane, Barbara Code: KHC-1106 Assmt. ID: 100106	Completed	• Caregiver Compliance	Life Care Demo Payer (KHC) T1019 697415456144	...
04/24/2025 (DF) 03:00 PM - 03:15 PM 0h 15m	Start: 03:00 PM ✅ End: 03:15 PM ✅ Duration: 0h 15m	Grey, Lexie Admsn. ID: KHC-900103	Zidane, Barbara Code: KHC-1106 Assmt. ID: 100106	Completed		Life Care Demo Payer (KHC) T1019 697415456144	...
04/24/2025 (NS) 0h 30m	Start: 01:45 PM ✅ End: 02:15 PM ✅ Duration: 0h 30m	Grey, Lexie Admsn. ID: KHC-900103	Zidane, Barbara Code: KHC-1106 Assmt. ID: 100106	Completed		Life Care Demo Payer (KHC) T1019 697415456144	...

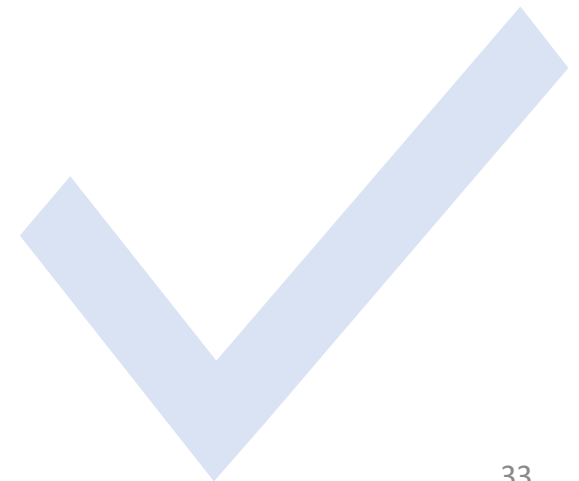
Page 1 of 1 1 to 3 of 3

# > Prevention - No Schedule on Calendar



## How do you prevent it next time?

- ✓ Confirm schedules are created before services occur
- ✓ Use recurring schedules or master weeks when applicable
- ✓ Review calendars daily for gaps
- ✓ Align scheduling practices with how services are delivered (scheduled vs. unscheduled)



# > VM Scenario 2: GPS Out of Range



**Scenario: A caregiver clocks in and out using the Mobile App, but the GPS location shows outside the acceptable range of the patient's address.**

## What is the issue?

- The visit was captured electronically, but the GPS location does not match the patient's recorded address.

## Why does it matter?

- EVV requires location verification. When GPS is out of range, the visit may be flagged as an exception and require review before it can be compliant and billing-ready.

## How do you resolve it?

- **Confirm** the patient's address is accurate in the system
- **Review** GPS details in Visit Maintenance
- **Determine** whether the visit occurred at the correct location
- **Link or reject** the visit appropriately based on agency policy
- **Save** the visit once reviewed

# VM Demo: GPS Out of Range



## Visit Maintenance

Visits

Unscheduled Services

EVV Attempts

All fields marked with an asterisk (\*) are required.

Office \*

UMA healthcare x UMA health care training x  
UMA MI office x

Date Range \*

10/24/2025 - 10/24/2025

Visit Status

Select one or more

Visit Exceptions

Select one or more

> Advanced Filters

Search

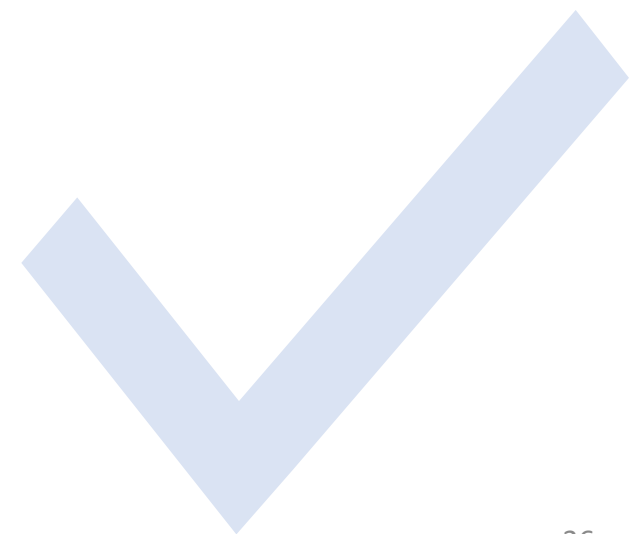
Reset

# > Prevention - GPS Out of Range



## How do you prevent it next time?

- ✓ Verify patient addresses during intake and updates
- ✓ Remind caregivers to clock in & out at the service location
- ✓ Review GPS exceptions early to spot patterns

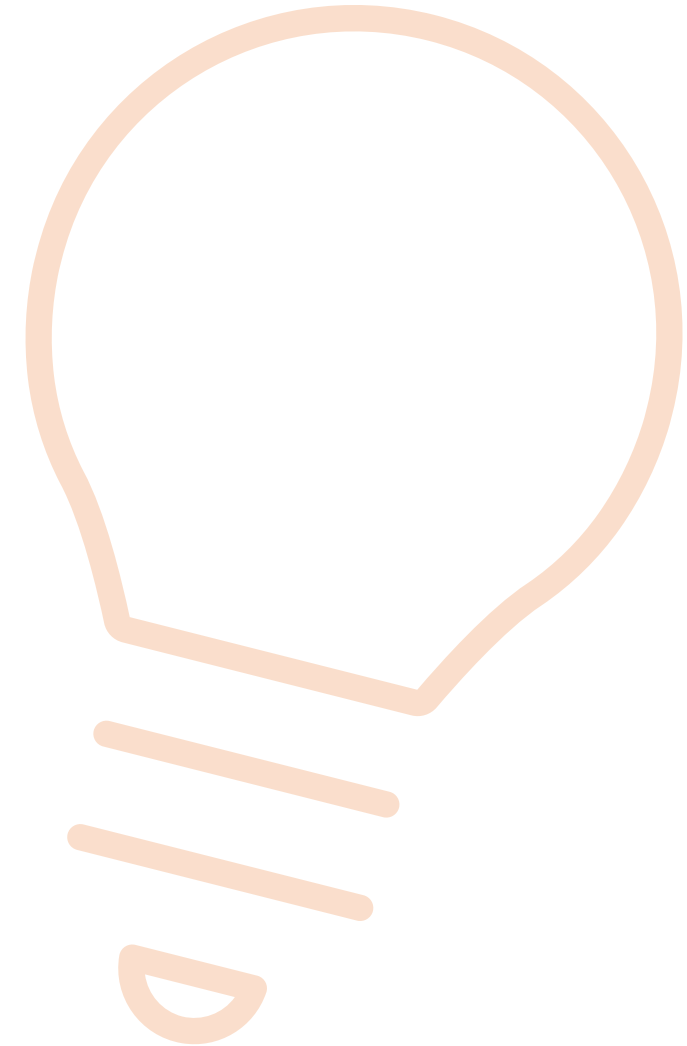


## Knowledge Check- GPS Out of Range



**What should you verify first when resolving a GPS Out of Range exception?**

- A. Edit the visit times
- B. Delete and recreate the visit
- C. Confirm the patient's address accuracy**
- D. Manually confirm the visit



# > VM Scenario 3: Editing Visit Times = “Out of Window”



Scenario: A caregiver arrives late or leaves early, and the office edits the visit clock-in or clock-out time to match what occurred.

## What is the issue?

- Editing visit times changes the original EVV data and requires proper documentation to remain compliant.

## Why does it matter?

- Any time change without the correct reason can turn a compliant visit into a non-compliant one and create downstream billing issues.

## How do you resolve it

- **Determine** whether the visit time truly needs to be changed
- Use **Visit Maintenance** to edit visit times only when necessary
- Select the appropriate **Visit Edit Reason**
- Use **Calendar Notes** for general documentation when times do not need to change
- **Save** the visit after review

## Disclaimer:

According to your state’s EVV rules, modifying EVV times may result in a non-compliant visit.



# Demo: Visit Maintenance – Out Of Window & No Schedule Opening



## Visit Maintenance

Visits **Unscheduled Services** EVV Attempts

All fields marked with an asterisk (\*) are required.

Office \*

UMA healthcare x UMA health care training x  
UMA MI office x

Date Range \*

10/01/2025 - 10/24/2025

Visit Status

Select one or more

Visit Exceptions

Select one or more

> Advanced Filters

Search

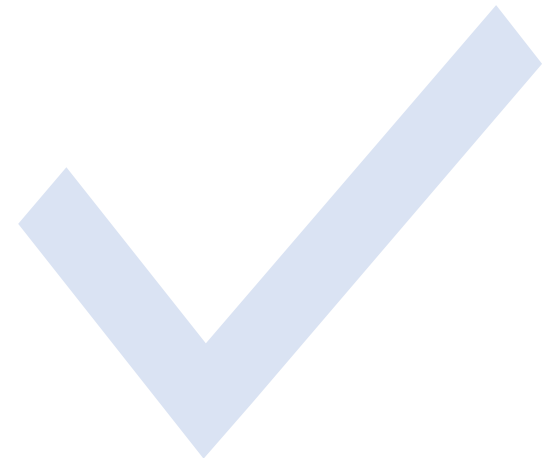
Reset

# > Prevention - Editing Visit Times



## How do you prevent it next time?

- ✓ Train caregivers on accurate clock-in/out timing
- ✓ Avoid editing times unless required
- ✓ Understand your state rules regarding EVV compliance
- ✓ Review EVV details before selecting a Visit Edit Reason

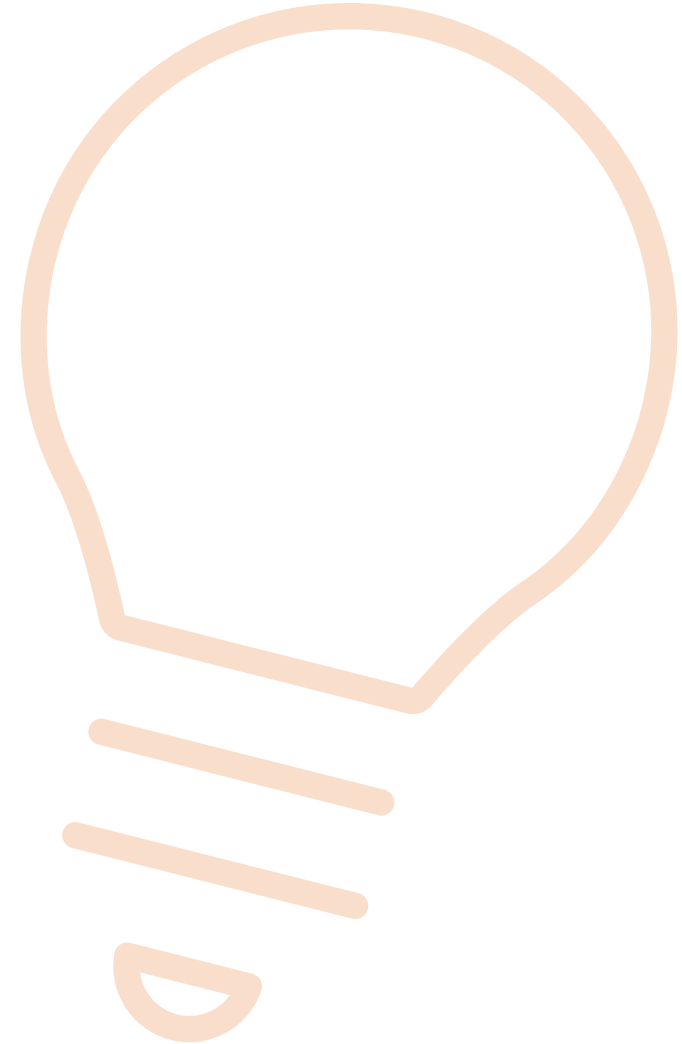


## Knowledge Check- Missing EVV Match



**What is the best action when a visit shows a missing EVV match?**

- A. Manually confirm the visit
- B. Edit the visit times
- C. Link the existing EVV record in Visit Maintenance**
- D. Delete the visit and recreate it



# Reports & Compliance Monitoring

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# > Reports & Compliance Monitoring Overview



## What is it?

- EVV reports provide visibility into visit activity and caregiver EVV compliance across your agency. Examples include:
  - **Visit Report**
  - **EVV Compliance by Caregiver Report**

## Why does it matter?

- Reports help agencies stay proactive by identifying trends, reducing repeat EVV issues, and preventing billing delays before they occur.

## How is it used?

- Agencies run EVV reports regularly to monitor visit accuracy, review caregiver compliance, and take action when patterns emerge.

# Visit Report



## What is it?

- The Visit Report displays detailed information for scheduled and completed visits, including visit dates, times, EVV confirmation status, and billing readiness.

## Why is it useful?

- The Visit Report helps agencies review visit activity, identify EVV issues early, and confirm that visits are complete and ready to move forward in the workflow.

## When is it used?

- To review visit details for a specific date range
- To identify visits with EVV exceptions or missing information
- To validate visit data before billing
- To support troubleshooting and audits



# Visit Report

Access Instructions



1. Navigate to **Report > Visit > Visit Report**.
2. You can select to search by **Office , Payer, Visit date range**.  
(Optionally, you can add the additional filters.)
3. Select **Generate Report**.
4. Check Progress of Report under **Admin > Background Monitor** and **Download** from there.

# Visit Report Screenshot



If a list view is preferred for reviewing Visit Maintenance, the Visit Report can be downloaded.

B	C	D	E	F	G	H	I	J	L	M
Member (Admission ID)	Caregiver (Code)	Coordinator	Visit ID	Visit Date	Scheduled	Visit Time	Duration	Schedule Type	MCO	Service Code
Patient Patient (ABC-1234)	Caregiver Caregiver (ABC-1234)	Default	1234567890	8/1/2025	0800-0900	0800-0900	01:00	DF	Life Care Demo Payer (KHC)	T1021
Patient Patient (ABC-1234)	Caregiver Caregiver (ABC-1234)	Default	1234567890	8/2/2025	1000-1100	1000-1100	01:00	DF	Life Care Demo Payer (KHC)	T1021
Patient Patient (ABC-1234)	Caregiver Caregiver (ABC-1234)	Default	1234567890	8/2/2025	0800-0900	0800-0900	01:00	DF	Life Care Demo Payer (KHC)	T1021
Patient Patient (ABC-1234)	Caregiver Caregiver (ABC-1234)	Default	1234567890	8/1/2025	1300-1500	1300-1500	02:00	DF	Life Care Demo Payer (KHC)	T1019
Patient Patient (ABC-1234)	Caregiver Caregiver (ABC-1234)	Default	1234567890	8/1/2025	0800-1200	0800-1200	04:00	DF	Life Care Demo Payer (KHC)	T1019:U1
Patient Patient (ABC-1234)	Caregiver Caregiver (ABC-1234)	Default	1234567890	8/7/2025	0800-1200	0800-1200	04:00	DF	Life Care Demo Payer (KHC)	T1019:U1
Patient Patient (ABC-1234)	Caregiver Caregiver (ABC-1234)	George Test	1234567890	8/1/2025	0915-0930	0910-0925	00:15	DF	Life Care Demo Payer (KHC)	S5130
Patient Patient (ABC-1234)	Caregiver Caregiver (ABC-1234)	George Test	1234567890	8/1/2025	0000-0000	2100-2300	02:00	DV	Life Care Demo Payer (KHC)	S5130
Patient Patient (ABC-1234)	Caregiver Caregiver (ABC-1234)	George Test	1234567890	8/2/2025	2200-2330	2200-2330	01:30	DF	Life Care Demo Payer (KHC)	S5130
Patient Patient (ABC-1234)	Caregiver Caregiver (ABC-1234)	George Test	1234567890	8/2/2025	1300-1330	1300-1330	00:30	DF	Life Care Demo Payer (KHC)	S5130
Patient Patient (ABC-1234)	Caregiver Caregiver (ABC-1234)	George Test	1234567890	8/4/2025	0000-0000	0916-1032	01:16	NS	Life Care Demo Payer (KHC)	S5130
Patient Patient (ABC-1234)	Caregiver Caregiver (ABC-1234)	George Test	1234567890	8/5/2025	0000-0000	1621-1646	00:25	NS	Life Care Demo Payer (KHC)	S5130
Patient Patient (ABC-1234)	Caregiver Caregiver (ABC-1234)	George Test	1234567890	8/6/2025	0000-0000	1305-		NS	Life Care Demo Payer (KHC)	S5130
Patient Patient (ABC-1234)	Caregiver Caregiver (ABC-1234)	George Test	1234567890	8/7/2025	0000-0000	0946-1145	01:59	NS	Life Care Demo Payer (KHC)	S5130
Patient Patient (ABC-1234)	Caregiver Caregiver (ABC-1234)	George Test	1234567890	8/8/2025	1330-1430	1330-1430	01:00	DF	Life Care Demo Payer (KHC)	S5130
Patient Patient (ABC-1234)	Caregiver Caregiver (ABC-1234)	George Test	1234567890	8/12/2025	0000-0000	1632-1832	02:00	DV	Life Care Demo Payer (KHC)	T1019:UA
Patient Patient (ABC-1234)	Caregiver Caregiver (ABC-1234)	George Test	1234567890	8/13/2025	1530-2230	1524-2223	06:59	DF	Life Care Demo Payer (KHC)	T1019

# > EVV Compliance by Caregiver Report



## What is it?

- This report displays each caregiver's EVV compliance performance over a selected time period, including compliance percentages and EVV exception counts.

## Why is it useful?

- The report helps agencies identify caregivers who may be struggling with EVV capture and need additional coaching or follow-up, reducing repeat exceptions.

## When is it used

- To monitor caregiver EVV compliance trends over time
- To identify patterns of missed clock-ins or clock-outs
- To support targeted training and coaching efforts
- To improve overall EVV compliance across the agency



# EVV Compliance by Caregiver Report



Access Instructions

1. Navigate to **Reports > EVV Compliance reports > EVV compliance by Caregiver**.
2. Select **date range, office, and caregiver names**.
3. Select **View Report**.
4. Review **EVV exceptions and EVV Compliance percentage** columns.
5. Click **Export** and choose preferred format.



# EVV Compliance by Caregiver Report Screenshot



## EVV Compliance By Caregiver (New)

Page 1 of 22

Report Date: 01/06/2025 10:21

Office(s): [Redacted]	From Date: 12/28/2024	To Date: 1/3/2025
Caregiver: All	Type of Service: Non-Skilled	Coordinator: All
Discipline(s): All	Service Code(s): All	Contract(s): All
Caregiver Location(s): All	Caregiver Team(s): All	Caregiver Branch(es): All
Include Type: All		

Sr.#	Contract	Caregiver Code	Caregiver Name	Total Visits	Confirmed Visits	Total EVV Compliant Visits	Billed Visits	Missed Visits	Visit with Exceptions	% Exceptions	EVV Compliance Percentage
1	[Redacted]	[Redacted]	[Redacted]	7	7	5	2	0	2	28.57%	71.43%
2	[Redacted]	[Redacted]	[Redacted]	7	5	0	2	0	5	100.00%	0.00%
3	[Redacted]	[Redacted]	[Redacted]	7	7	4	2	0	3	42.86%	57.14%
4	[Redacted]	[Redacted]	[Redacted]	7	7	7	2	0	0	0.00%	100.00%
5	[Redacted]	[Redacted]	[Redacted]	5	4	4	0	0	0	0.00%	100.00%
6	[Redacted]	[Redacted]	[Redacted]	7	7	7	2	0	0	0.00%	100.00%
7	[Redacted]	[Redacted]	[Redacted]	7	7	5	2	0	2	28.57%	71.43%
8	[Redacted]	[Redacted]	[Redacted]	7	7	6	2	0	1	14.29%	85.71%
9	[Redacted]	[Redacted]	[Redacted]	7	4	4	2	3	0	0.00%	100.00%
10	[Redacted]	[Redacted]	[Redacted]	5	5	5	2	0	0	0.00%	100.00%

# EVV Compliance Summary Report



This report shows the **Compliance Percentage** of each contract for a given time period.

- It is recommended to run the EVV Compliance Summary Report weekly to be on top of EVV compliance and make any necessary adjustments when needed.

	A	B	C	D	E	F	G	H	I	J
1		<b>MCO</b>	<b>Total Visits</b>	<b>Total EVV Compliant Visits</b>	<b>Confirmed Visits</b>	<b>Billed Visits</b>	<b>Missed Visits</b>	<b>Visits with Exceptions</b>	<b>% Exceptions</b>	<b>EVV Compliance Percentage</b>
2	1	AmeriHealth Caritas of PA (ABC)	2,241	1,809	2,118	2,099	6	309	14.59%	85.41%
3	2	Centene PA Health Wellness (ABC)	1,584	1,332	1,539	1,517	0	207	13.45%	86.55%
4	3	KEYSTONE FIRST CHC (ABC)	3,498	2,746	3,229	3,189	0	483	14.96%	85.04%
5	4	Private Pay	55	43	54	0	0	11	20.37%	79.63%
6	5	Promise - ACT 150	40	37	40	0	0	3	7.50%	92.50%
7	6	PROMISE - ODP	541	484	524	0	1	40	7.63%	92.37%
8	7	UPMC LTSS (ABC)	3,683	2,904	3,377	3,326	0	473	14.01%	85.99%
9		<b>Total:</b>	<b>11,642</b>	<b>9,355</b>	<b>10,881</b>	<b>10,131</b>	<b>7</b>	<b>1,526</b>	<b>14.02%</b>	<b>85.98%</b>
10										

# Other Compliance Reports



The following reports can be found under Report > EVV Compliance Reports.

Report Name	Function
<b>EVV Compliance Daily Summary Report</b>	Daily compliance percentage per contract
<b>EVV Compliance Detail Report</b>	Compliance exception and reasons per day, per patient
<b>EVV Compliance Exception Reason Usage Report</b>	Compliance exception reasons and corresponding percentages per contract

## Knowledge Check- Reports & Compliance Monitoring



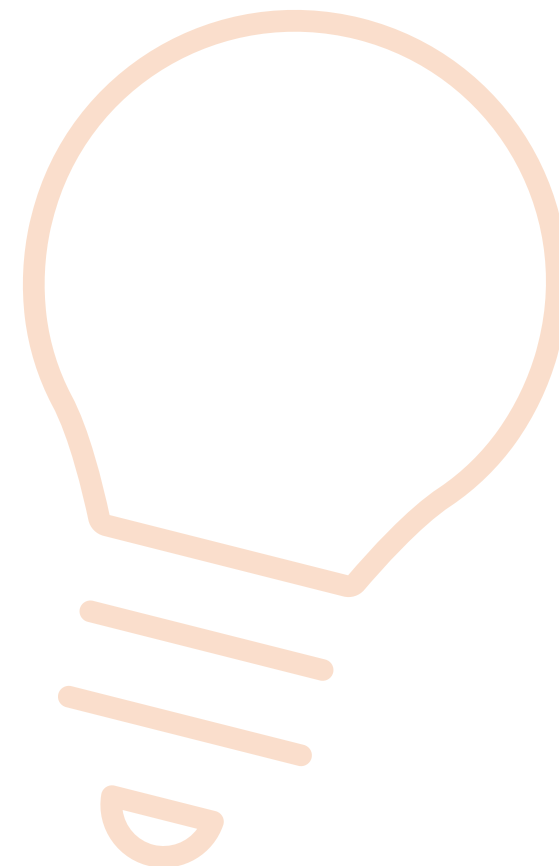
Which report should you use to monitor caregiver EVV compliance trends over time?

A. EVV Compliance by Caregiver Report

B. Visit Report

C. Prebilling Report

D. Invoice Summary Report





# Key Takeaways

# Key Takeaways



## **EVV Overview**

- EVV verifies who provided care, when it occurred, and where it took place to support compliance and billing readiness.

## **EVV Tools & Visit Capture**

- Capturing EVV correctly at the time of the visit using approved tools prevents avoidable exceptions later.

## **Visit Verification & Maintenance**

- Visit Maintenance is where EVV issues are reviewed and resolved – link existing EVV instead of recreating visits.

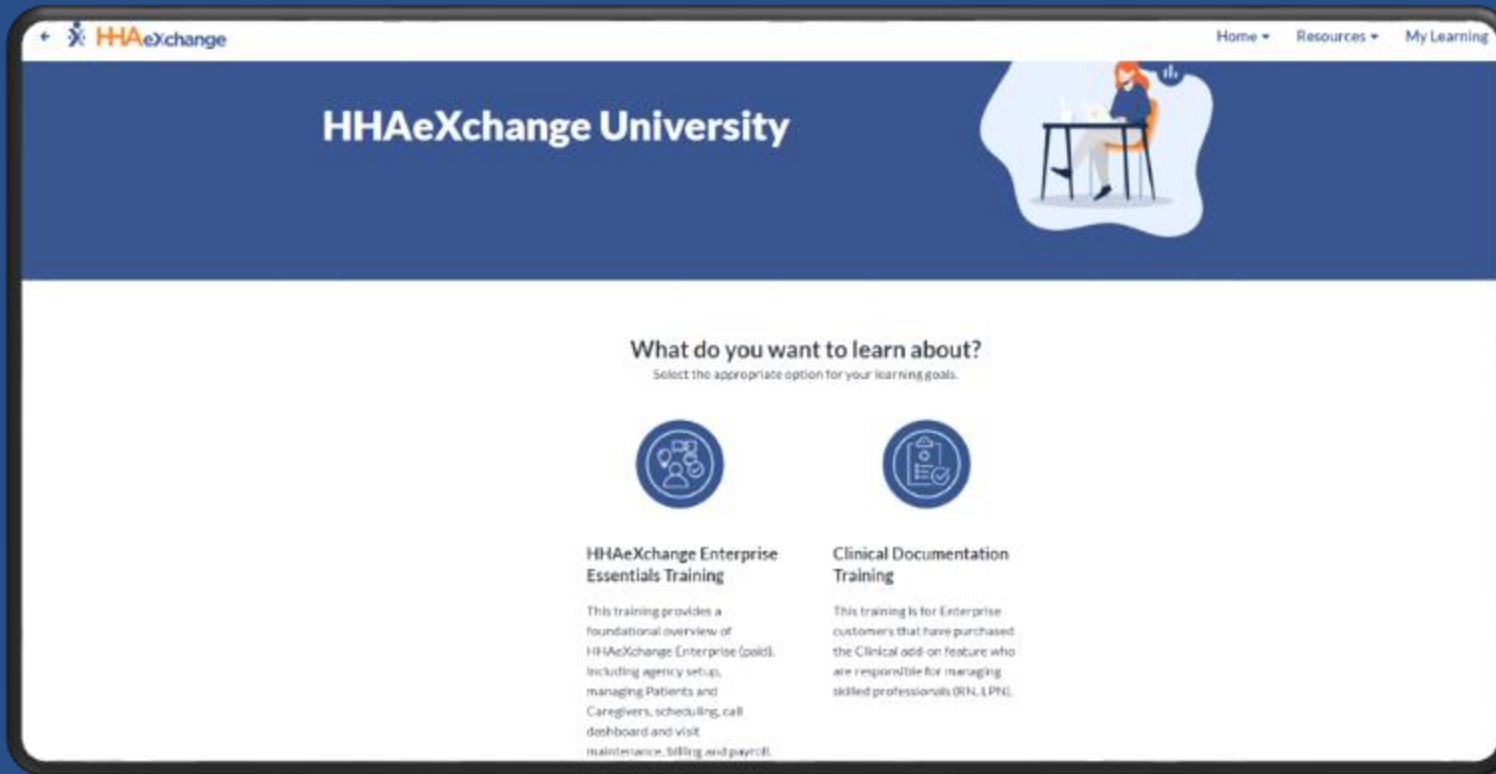
## **Reports & Compliance Monitoring**

- Use the Visit Report to review individual visits and EVV Compliance by Caregiver to monitor trends.



# Resources

# Learning Management System (LMS)



HHAeXchange University is available for your agencies to have a foundational overview of key topics such as:

- Patient & Caregiver Management
- Caregiver Setup
- Visit Maintenance
- Billing



<https://university.hhaexchange.com>

# HHAXchange Knowledge Bases!



Agencies have access to our new knowledge bases.

- Provider can learn how to use our system.
- Caregivers can learn how to use our EVV tools.
- Review troubleshooting information.
- Use Caree our new Virtual assistant!



The screenshot shows a user interface titled "What best describes you?". It features five selectable options, each with an icon, a title, and a brief description. The "Agency / Provider" option is highlighted with a blue border and a mouse cursor pointing at it. The options are:

- Agency / Provider**: Administrators of day-to-day homecare business operations. (Icon: two people)
- Caregiver**: Experts in providing in-home care services. (Icon: person with heart)
- Payer**: Organizations responsible for claims and billing governance. (Icon: document with dollar sign)
- Third-Party EVV Integration**: Partners in connecting agency data to payers using API or EDI. (Icon: gear with plus sign)
- Texas**: Texas Program Providers and Financial Management Services Agencies (FMSA). (Icon: map of Texas)

<https://www.hhaexchange.com/knowledge-base>

## Visit Capture:

- [Getting started HHAeXchange mobile app](#)
- [Mobile Offline Mode](#)
- [Setup the Mobile App Offline Mode in the Portal](#)
- [EVV overview](#)
- [IVR overview](#)

## Visit Maintenance:

- [Visit Maintenance Feature](#)
- [Visit Maintenance Landing Page](#)
- [Visit Maintenance How-To Videos](#)

## Reports:

- [EVV Compliance by Caregiver Report](#)

# Mark Your Calendars!



## Visit the HHAeXchange Customer Events Page

- Register for upcoming live trainings and webinars tailored to your agency
- Find sessions on EVV, mobile app, scheduling, billing, reporting, and more
- Get expert tips, real-time answers, and practical takeaways to boost efficiency



[Customer Training Events:](#)  
[Elevate Your Skills | HHAeXchange](#)

The screenshot shows the HHAeXchange website's 'Upcoming HHAeXchange Customer Events' page. At the top, the HHAeXchange logo is displayed. Below the title, a sub-header reads: 'We look forward to seeing you at one of our customer training webinars or in-person training events.' There is a search bar and a 'Filter by Event Type' dropdown menu. Three event cards are visible:

- Event 1:** 'EVV Made Simple: How to Stay Compliant Every Day' on Tuesday, January 13 at 1PM ET. The image shows three people in a meeting.
- Event 2:** 'Minnesota EVV Readiness Bootcamp' on January 27th or 28th, 2026. The image shows two people reviewing documents.
- Event 3:** 'Post Go-Live Training + Office Hours: Admin Setup' on February 2nd at 2PM ET and February 4th at 2PM ET. The image is the HHAeXchange logo.



# Questions?

**THANKS FOR  
ATTENDING!**



*Please provide us your feedback  
after exiting the webinar.*



# Appendix

3:04



Signal strength, Wi-Fi, and battery (31%) icons



# HHAeXchange

Real Time Web-Based Management Solutions  
for Home Care Agencies & Payers

providerexperience@hhaexchange.com

Password



[Forgot Password?](#)

Cancel

Done

Login

Mobile Device ID: C554A5... Version: 25.09.01

[Sign Up](#)

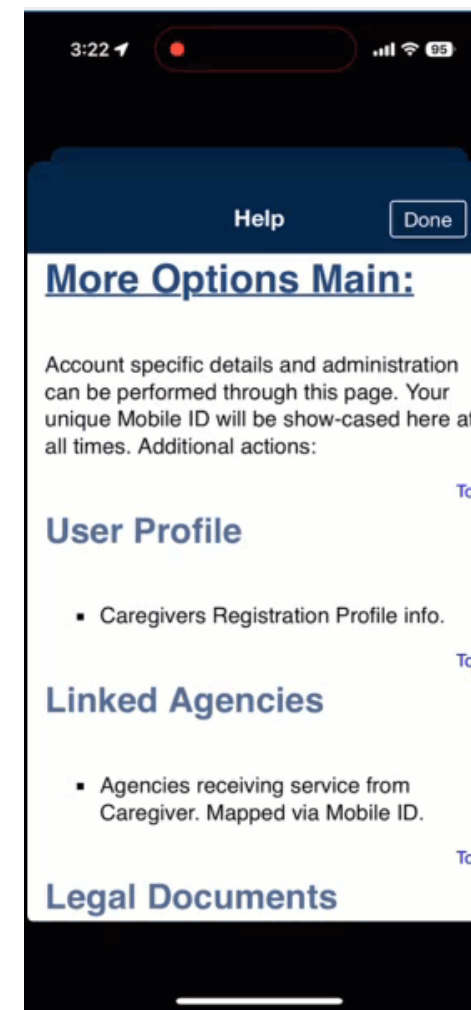
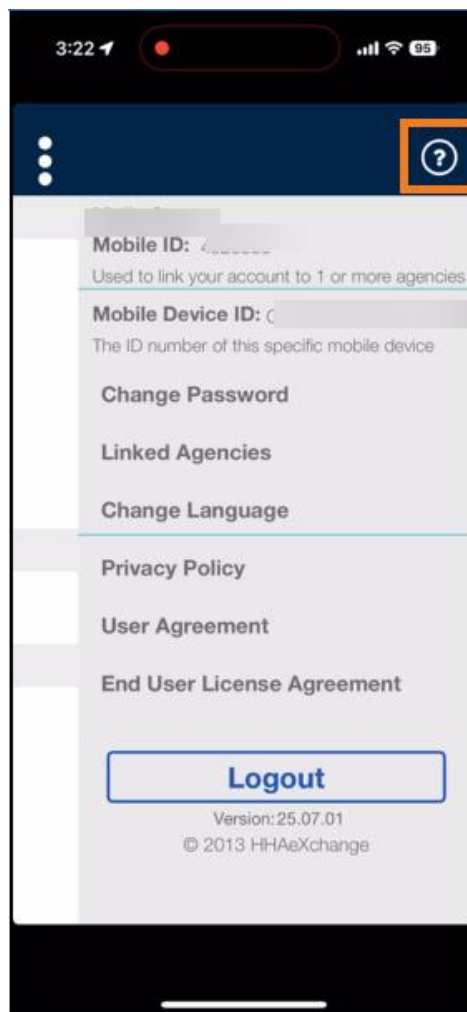
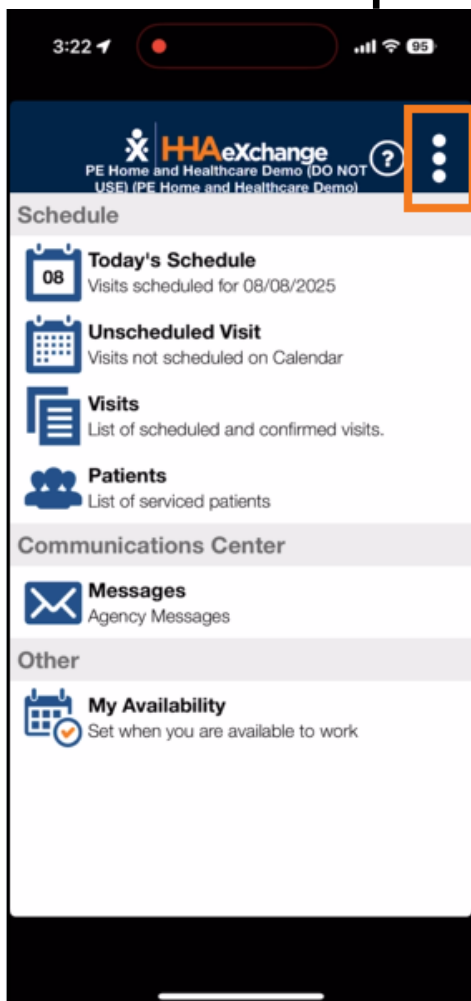


[Help Center](#)



# ➤ Troubleshooting

Caregivers can troubleshoot for the HHAeXchange mobile app with the Help feature.



# Visit Capture Overview

IVR



- Ensure Caregivers have the correct Time & Att. Pin (assignment ID), the provider's IVR phone number, and patient's home phone number.
- Caregivers will need to make sure they are clocking in and out on time.
- When clocking out Caregivers will enter duties or bypass them by pressing **0000**, to complete the call out.
- Providers should provide the duty codes.



**Tip:** Complete the clock out process by entering or bypassing duties.

# Visit Maintenance Scenarios & Demos

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## Visit Maintenance: Billing Adjustment



While reviewing a caregiver's visits for the week, the coordinator notices that the caregiver clocked out 15 minutes late. To prevent an exception, the coordinator will need to adjust the billing hours to bill correctly.

**Call Out!:** Keep in mind that you can adjust downwards but will cause an exceptions if you try to adjust upwards.

 **Note:** *If you do not have access to billing adjustments, contact the TCC team to turn on.*

---

### Steps:

1. Go to the **Visit > Visit Maintenance**
2. Search for the visit that needs to be adjusted.
3. Select **Actions > Select View/Edit Visit Details.**
4. Select **Billing Info** Tab.
5. Go to the **Adjusted hours** field.
6. Add the adjusted time and select **Save.**

Lee Walter Active

Date of Birth 12/01/1960

Patient [ Alt ID ] -- [ -- ]

Admission ID KHC-900005

Home Phone 512-506-7000

Address 1367 sw 3rd st, MIAMI, FL, 33135

Languages --

Payer Life Care Demo Payer (KHC)

Coordinators George Test

Office UMA healthcare

Patient Search

- General
- Payers/Insurance
- Profile
- Eligibility Check
- Auth/Orders
- Special Requests
- Master Week
- Calendar
- Visits
- POC/PCP
- Caregiver History
- Rates
- Financial
- Family Portal
- Doc Management

Authorizations

Payer	Auth. #	From Date	To Date	Discipline	Healthcare Common Procedure Coding System (HCPCS)	Max Auth.	Type	Period	Max Period	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Remaining Auth.	Notes	Actions
Life Care Demo Payer (KHC)	324324342	11/01/2023	09/30/2025	PCA	T1019	20000.00 hrs	Hourly	Weekly	200000.00 hrs								19157.75 hrs		...
Life Care Demo Payer (KHC)	765757	10/01/2023	09/30/2025	PCA	S5130	2000.00 hrs	Hourly	Weekly	300.00 hrs								1479.50 hrs		...
Life Care Demo Payer (KHC)	10001787	09/01/2023	11/30/2023	PCA	T1019	100.00 hrs	Hourly	Weekly	100.00 hrs								0 hrs		...

Calendar

History Legend

Month: July Year: 2025

Add Weekly Variable Schedule Add a Visit

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
30	1 S: 2h 0m  Billed: N	2 S: 2h 0m  Billed: N	3 S: 2h 0m  Billed: N	4 S: 2h 0m  Billed: N	5	6

## Visit Maintenance: Edit Reasons



A caregiver forgot to clock out. The coordinator confirms the end time and manually enters it with the appropriate required **EVV Reason Code**; the **Action Taken** field is optional to prevent an *Incomplete Confirmation* exception.

 *Note: EVV Reason Code is required; Action Taken and a New Note are optional but strongly recommended for audit support.*

---

### Steps:

1. Go to the **Visit > Visit Maintenance**
2. Search for the visit that needs to be edited.
3. Select **Actions > Select View/Edit Visit Details**.
4. Select **Visit Info** Tab.
5. Edit out time, manually confirming the clock out due to caregiver forgetting.
6. Select the **EVV Reason Code** and **Action Taken** then select **Save**.



# Hello Snaktest



Placements (6 Pending)

**System Notifications**

Direct Messages

Tasks

Linked Communication

## Search System Notifications

Priority

Status

From



To



Search

# > VM Scenario 4: Missing EVV Match



Scenario: A visit appears on the schedule, and EVV was captured, but the system shows no EVV match linked to the visit.

## What is the issue?

- The EVV record exists, but it is not properly linked to the scheduled visit in the system.

## Why does it matter?

- When EVV is not matched to the visit, the visit remains non-compliant and cannot move forward for billing without review and correction.

## How do you resolve it?

- Navigate to **Visit Maintenance**
- **Locate** the visit with the missing EVV match
- **Review** available EVV records for the correct date and time
- **Link** the correct EVV record to the scheduled visit or enter time manually if no EVV available
- **Save** the visit after confirming the match or editing

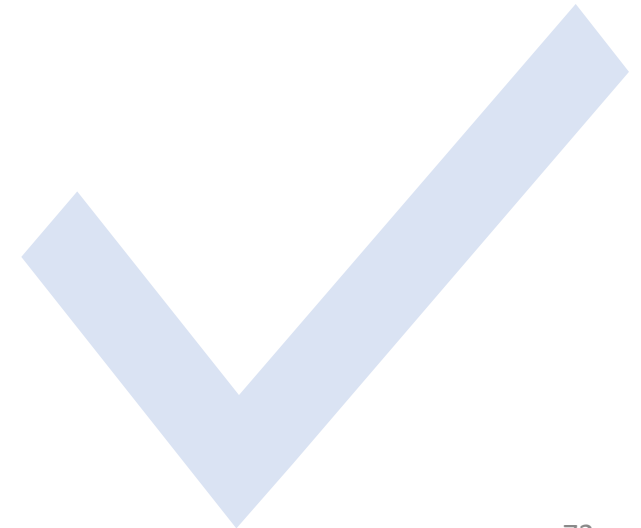
**Disclaimer:**  
According to your state's EVV rules, modifying EVV times may result in a non-compliant visit.

# > Prevention - Missing EVV Match



## How do you prevent it next time?

- ✓ Ensure schedules align with actual service times
- ✓ Resolve exceptions daily instead of waiting until the end of billing cycle
- ✓ Reinforce: If EVV exists, link it & don't recreate it





# EVV Compliance by Caregiver Report



Access Instructions

1. Navigate to **Reports > EVV Compliance reports > EVV compliance by caregiver.**
2. Select **date range, office, and caregiver names.**
3. Select **View Report.**
4. Review **EVV exceptions and EVV Compliance percentage** columns.
5. Click **Export** and choose preferred format.

# Hello georgem

- Placements (9 Pending)**
- Events
- System Notifications
- Direct Messages
- Tasks
- Linked Communication

## Placements

- Pending (1)**
- Accepted with Temp Caregiver (8)
- Staffed (0)
- Accepted with No Master Week(0)

Patient ^	Admission ID ⇅	Office ⇅	Start Date ⇅	Stop Date ⇅	Frequency ⇅	Service Category ⇅	Service Type ⇅	Request Sent At ⇅	Status ⇅	Cut Off Time ⇅	MCO Name ⇅
XXXXX	5141341354	UMA healthcare	11/12/2024			Home Health	PCA	11/11/2024 12:41:42 PM	Pending	11/16/2043 11:20:42 PM	Life Care Demo Payer

Previous **1** Next

# Got questions? Check out these resources!

## What best describes you?



### Agency / Provider

Administrators of day-to-day homecare business operations.



### Caregiver

Experts in providing in-home care services.



### Payer

Organizations responsible for claims and billing governance.



### Third-Party EVV Integration

Partners in connecting agency data to payers using API or EDI.



### Texas

Texas Program Providers and Financial Management Services Agencies (FMSA)

## Trending Topics

Hi there 🙋

How can we help out today?

