



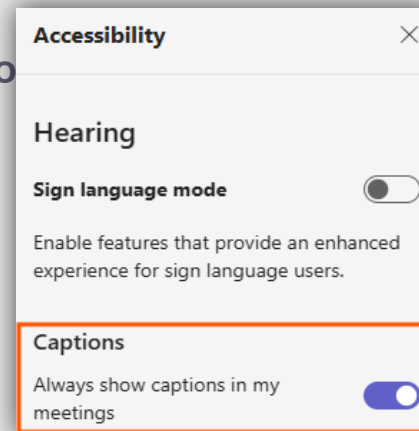
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EVV Made Simple: PA Home Health Compliance Training

June 17, 2026



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speakers



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Tenure: 3 years

Areas of Expertise: Sponsored Training



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Areas of Expertise: Sponsored Training

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

By the end of this session, participants will be able to:



Apply

Record visits accurately using EVV tools such as the Mobile App, Offline Mode, and IVR



Identify

Identify and resolve common EVV exceptions using Visit Maintenance



Understand

Understand how EVV accuracy affects prebilling and billing workflows



Leverage

Run EVV compliance and visit reports to monitor performance

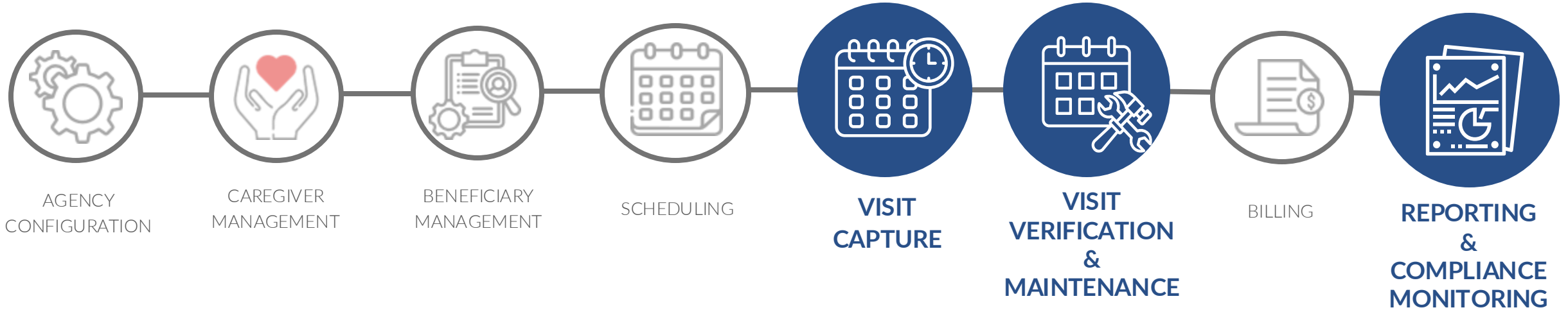
agenda

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



EVV Overview

> EVV Overview



➤ 6 Elements of a Cures Compliant Visit



Who

Member



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 IT MEANS

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

HOW IT'S IDENTIFIED

In HHAeXchange, non-compliant visits are flagged as **EVV Exceptions** for review and correction.

WHY IT MATTERS

Non-compliant visits can:

- Delay billing
- Trigger additional review
- Require manual corrections
- Increase audit risk

COMMON EVV EXCEPTIONS:

 No EVV captured  Location mismatch  Missing clock-in/out  Not linked to schedule  Manual confirmation used

> PA DHS EVV Compliance

Providers below 85% or with unresolved aggregation rejections face increased compliance risk.

COMPLIANCE THRESHOLD

85%

DHS compliance monitoring threshold

Activity below this level may be flagged for follow-up.

1

Monitor

Review EVV compliance

2

Aggregate

Confirm visits transmit

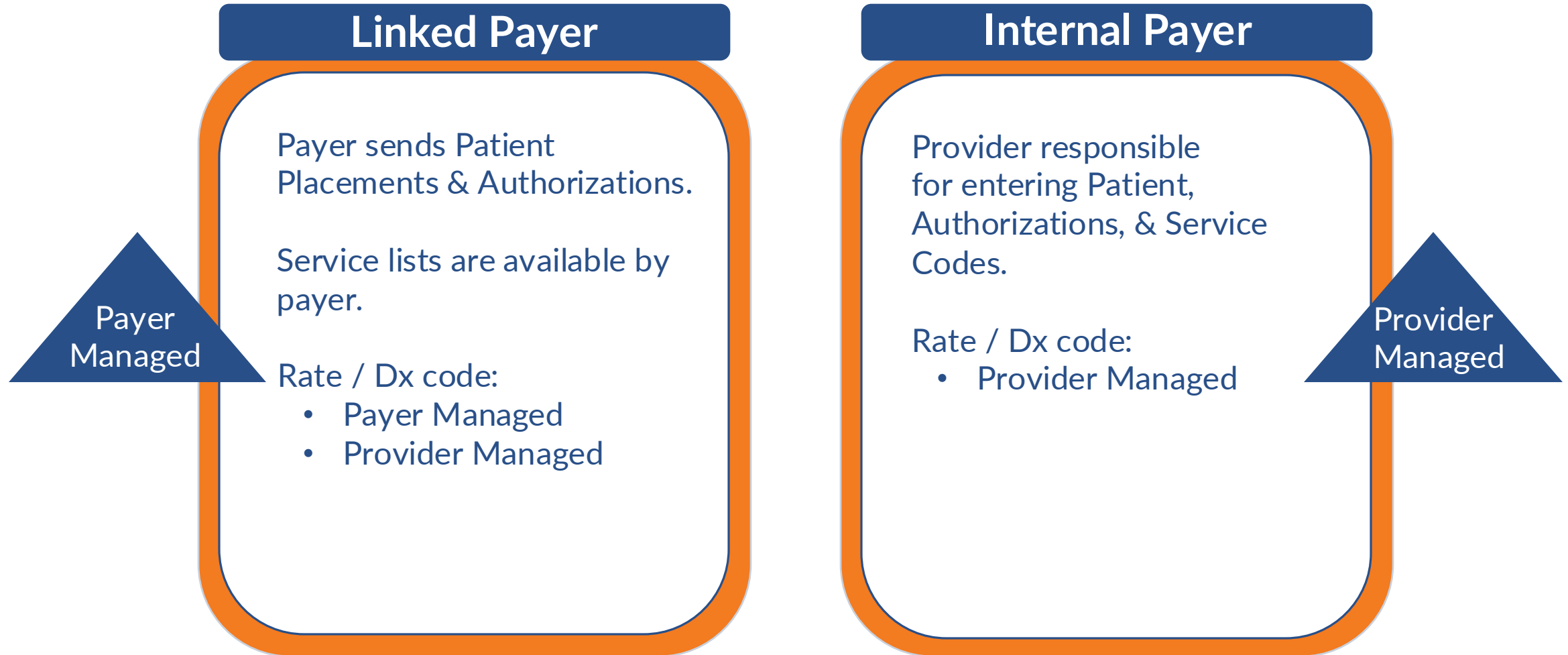
3

Resolve

Fix rejections quickly

MCOs mirrors DHS monitoring with additional emphasis on aggregated visits.

➤ Linked and Internal Payer Setup



➤ HHAeXchange Standard System Terminology

HHAeXchange Standard System Terminology

Corresponding Terminology

CONTRACT / PAYER	• FFS • HHS	• MCO • State	• Plan
PATIENT / MEMBER	• CDS Employer • Consumer	• Recipient • Client	• Participant • Beneficiary
CAREGIVER	• Aide • Homecare Aid • Homecare Worker	• Worker • Direct Care Worker • Service Provider	• Attendant • CDS Employee
AGENCY / PROVIDER	• FMSA • Vendor	• Program Provider	
COORDINATOR	• Care Coordinator • Case Coordinator	• Service Coordinator • Care Types	
UNITY NUMBER	• EMPI • Master Patient Number	• Shared Patient Number	
SECONDARY IDENTIFIER	• MPI • Promise Code		



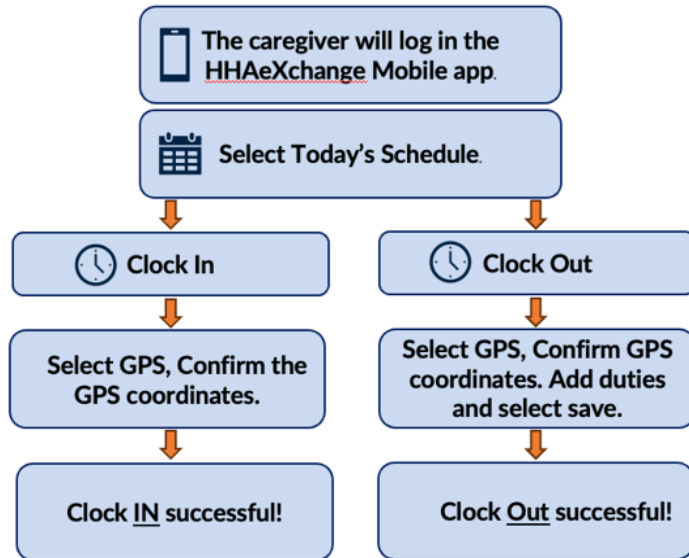
EVV Tools and Visit Capture

Visit Capture Process by Method

Mobile App

Preferred EVV method

Mobile App Overview



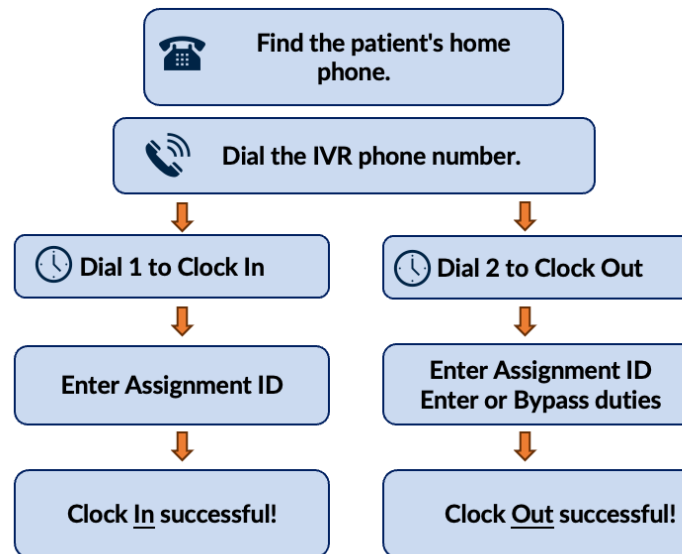
Best when caregivers are using the HHAX Mobile App at the patient location.

IVR

Alternative method

IVR Capture Overview

Interactive Voice Response Number English & Spanish



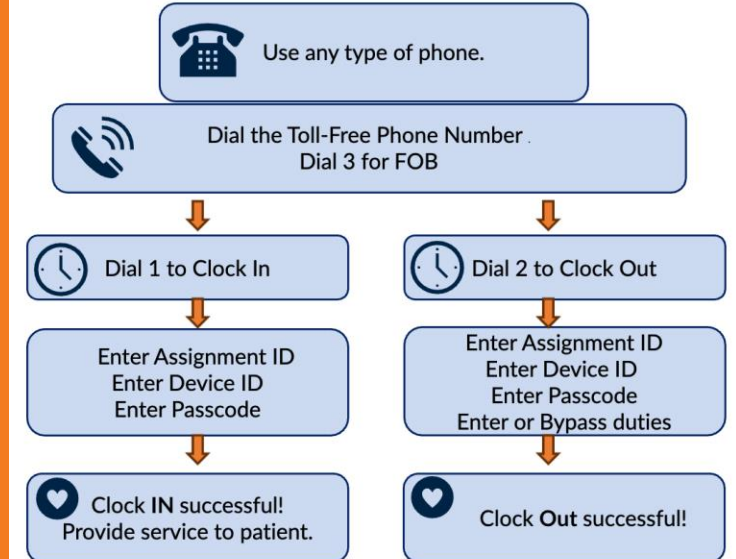
Use only when IVR is the approved method and the patient landline is available.

FOB

Alternative method

FOB Capture Overview

Alternate Device



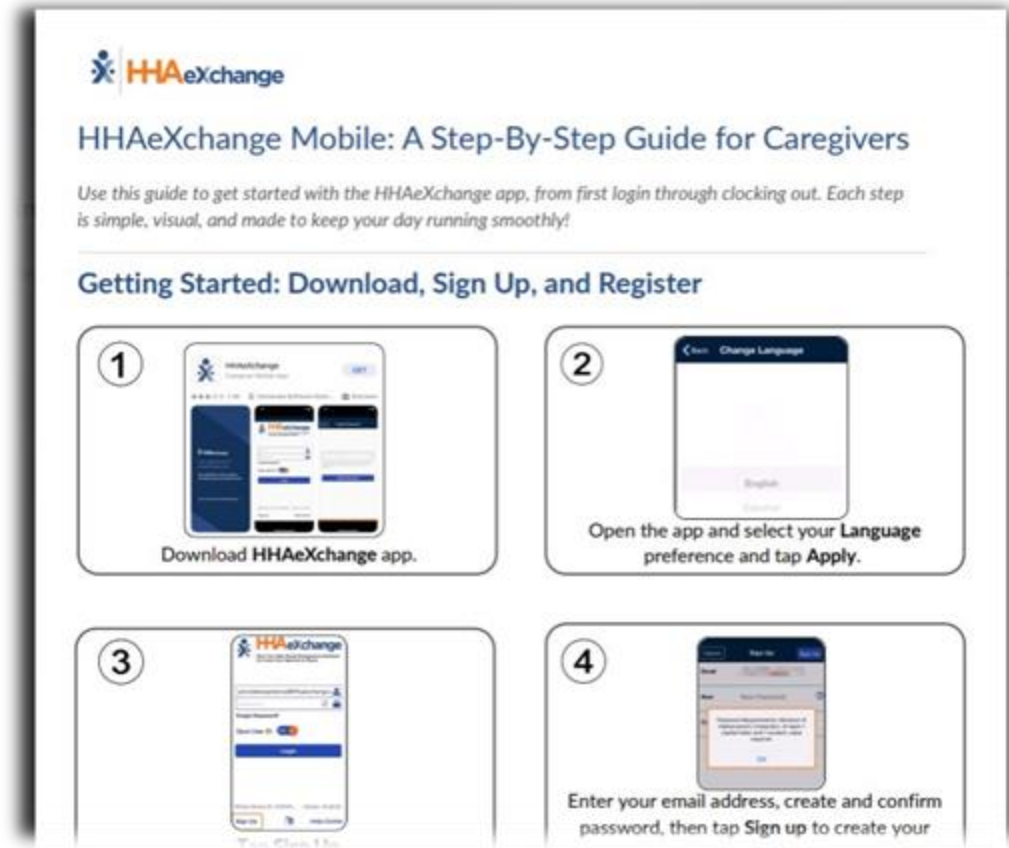
Use when FOB is configured and the caregiver has the correct Device ID and passcodes.

➤ Visit Capture: HHAeXchange Mobile App

Scenario:

The caregiver arrives at the Member's home to begin a scheduled (an unscheduled) visit and uses the **HHAeXchange Mobile App** to clock in. After completing the visit, the caregiver clocks out to accurately capture the visit for EVV compliance.

[HHAeXchange Caregiver User Guide](#)



Offline Mode Overview

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

- **Automatically** activates when the device has no signal or internet
- EVV data syncs automatically once connectivity is restored

Offline Mode Recommended Practices:

- Log into the mobile app with internet access to sync schedules and patient info.
- You can complete visits offline, both scheduled and unscheduled.
- At the end of the day, reconnect and sync all completed EVV visits with HHAeXchange.

[Knowledge Base: Offline Mode](#)



Offline Mode



Download
Infographics Here!



Offline Mode Video



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!

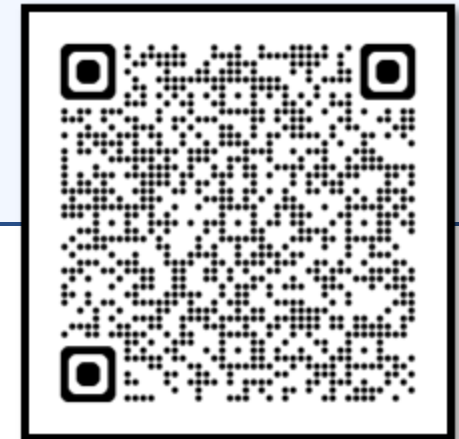
Visit Capture: Landline

Before calling, the Caregiver must have:

- HHAeXchange toll-free Landline number
- Employee Time & Attendance PIN
- Beneficiary's home phone number

How to use Landline:

- Go to the Beneficiary's home phone (Landline [IVR]).
- Dial the HHAeXchange toll-free number.
- Listen for the "Welcome to HHAeXchange" greeting.
- Follow the voice prompts:
 - Press 1 to Clock In & 2 to Clock Out
 - Enter your Time & Attendance PIN when prompted.
 - Enter the Assignment ID (if required).
 - Wait for the confirmation message that clock-in or clock-out was successful.



Visit Capture Best Practices

Compliant use requires the correct method, correct credentials, and accurate visit capture.

Complaint Use

- Approved capture method
- Clock at patient location
- Use correct IDs & PINs
- Match schedule & patient
- Complete full visit capture
- Use Offline Mode if needed

Non-Complaint Use

- Away from patient location
- Wrong capture method
- Incorrect credentials/device info
- Mismatch: GPS or visit details
- Missing clock-out, office edits
- Incomplete visit capture



Visit Maintenance

➤ Visit Maintenance Feature

What is it?

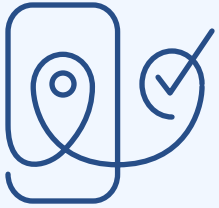
A central workspace for visit activity
Visit Maintenance brings visit status, EVV linkage, and exception handling into one place so agencies can review and resolve issues faster.

How is it used?

- **Review** completed visits
- **Resolve** EVV / prebilling exceptions
- **Link** EVV records to visits
- **View** visit details & authorizations

› Visit Maintenance Scenarios

These are the scenarios we are going to cover for Visit Maintenance.



**No Schedule
Opening**

Visit and EVV
both exist but
they aren't
connected yet.



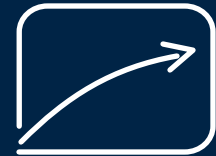
**No Schedule
on Calendar**

EVV record
exists but is not
linked to a visit.



**Out of
Window**

EVV does not
match the
scheduled visit
time.



**GPS Out of
Range**

Recorded GPS
location falls
outside the
patient's service
address.

› Visit Maintenance Scenario: No Schedule Opening

Scenario: A caregiver captured EVV for a visit, but there is no available schedule opening matching the visit details for that date and time.



What is the issue?

The EVV record exists, but the system cannot match it to a valid schedule opening for that service.



Why does it matter?

EVV needs to be attached to a schedule. The visit stays unresolved until details are reviewed and corrected, delaying compliance review and billing readiness.



How to resolve it?

1. Navigate to **Visit > Visit Maintenance**, apply filters for **No Schedule Opening**, then click **Search**
2. Locate the visit and **review EVV details** (patient, service, time, caregiver, authorization)
3. **Correct the mismatch** by updating or creating the appropriate visit so a valid schedule opening exists (or *reject if EVV is invalid*)
4. Click **Save** to resolve the exception

Hello Snaictest

- Placements (13 Pending)
- System Notifications**
- Direct Messages
- Tasks
- Linked Communication

Search System Notifications

Priority

All ▾

Status

All ▾

From

mm/dd/yyyy 

To

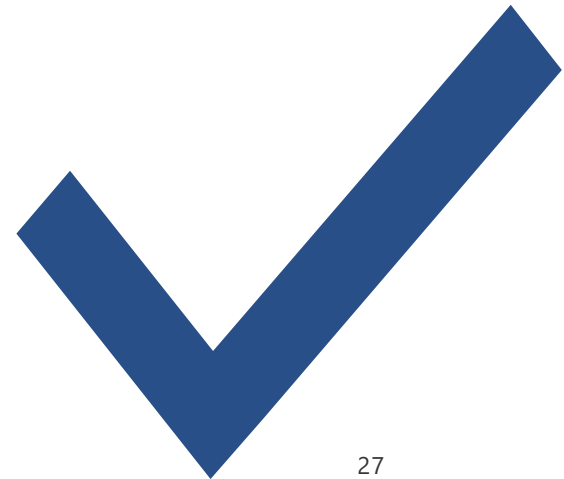
mm/dd/yyyy 

Search

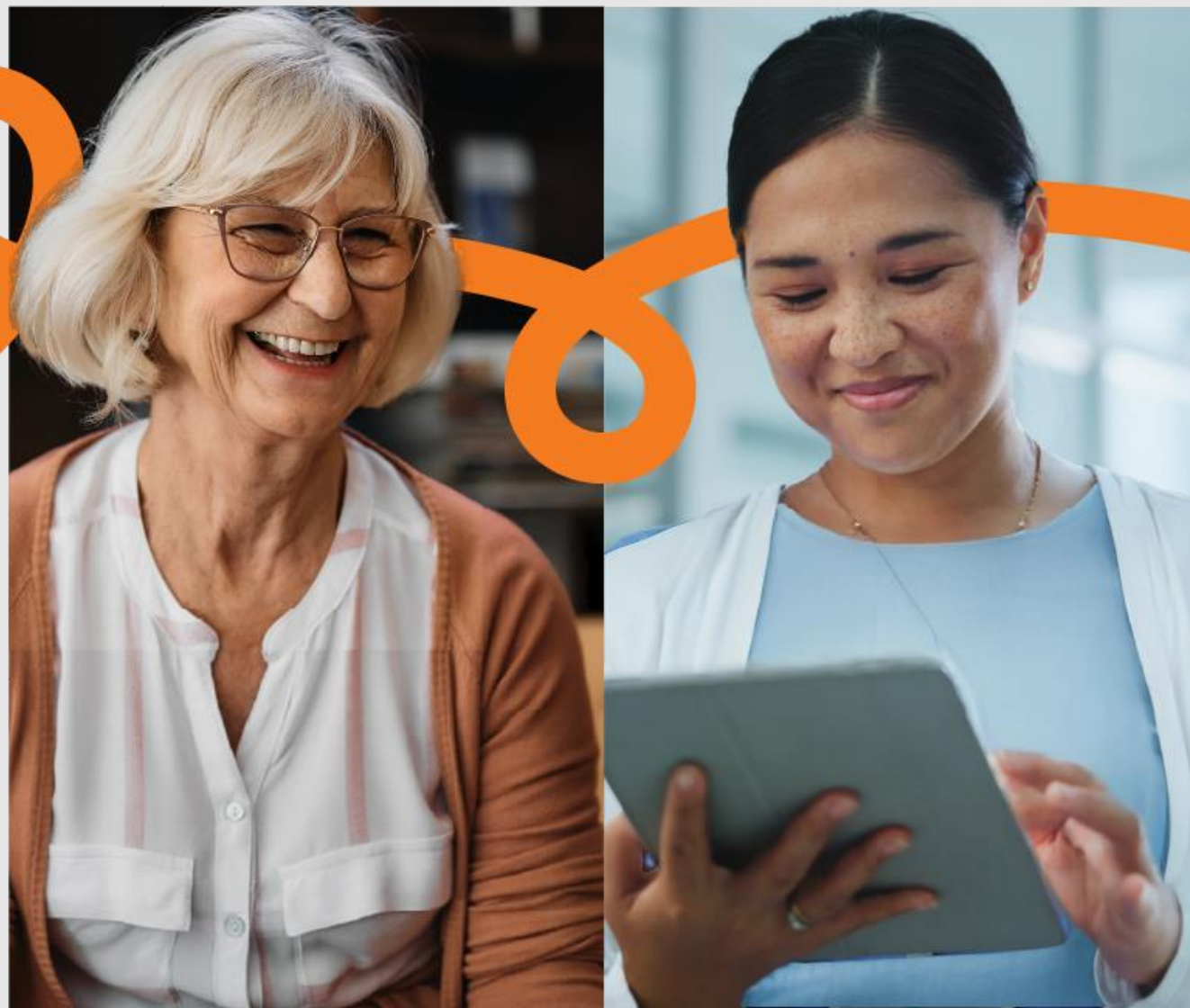
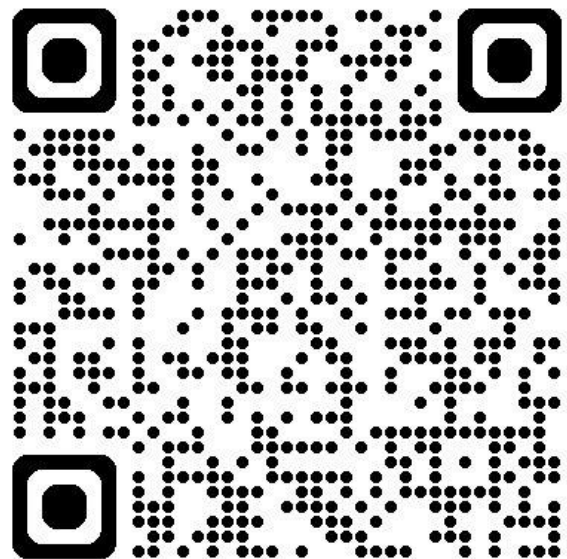
➤ Prevention - No Schedule Opening

How do you prevent it next time?

- ✓ Confirm a valid schedule opening exists before services occur
- ✓ Ensure patient, caregiver, service, and authorization details align
- ✓ Use the right schedule type when visit timing can vary
- ✓ Review unresolved EVV quickly so mismatches are fixed early



Visit Maintenance Resource



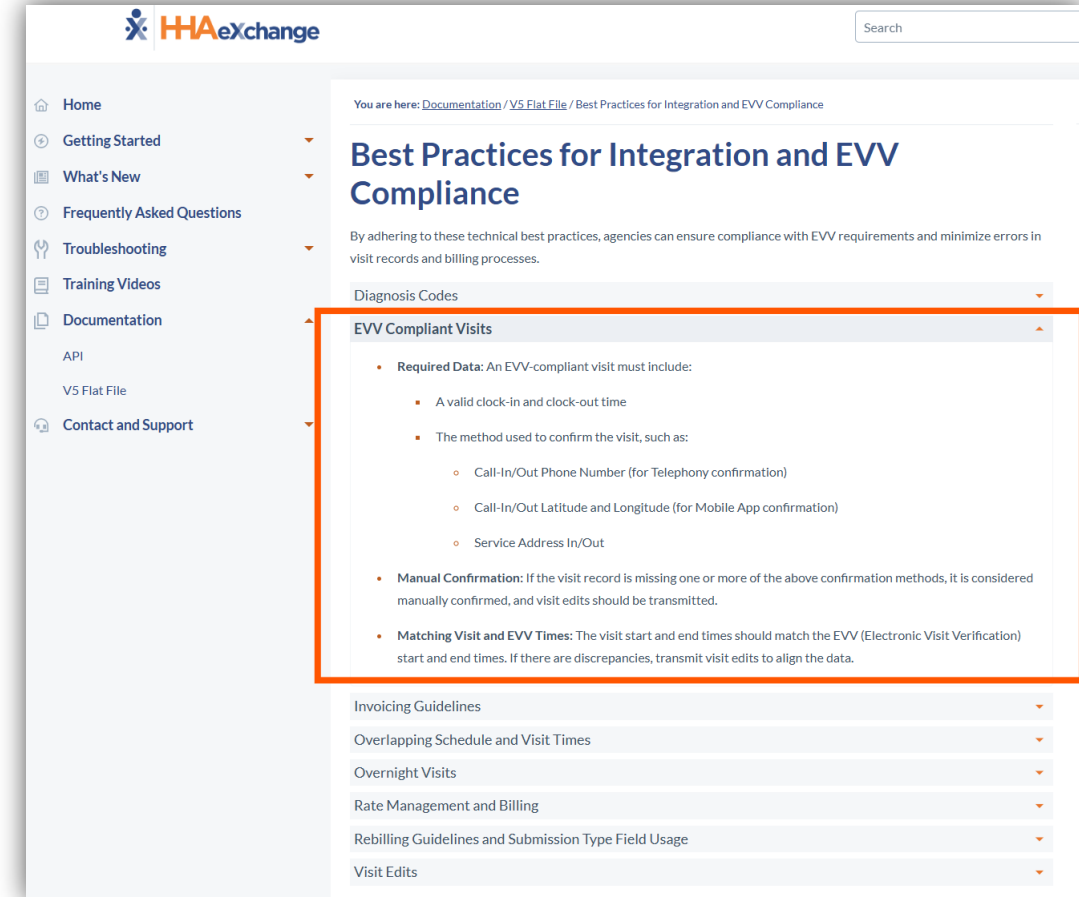


EDI

➤ Third-Party EVV (EDI) Providers

Workflow:

1. Ensure no exceptions in your 3rd party vendor system.
2. Best practice: Ensure information comes over correctly in your 3rd party vendor system.
3. EDI tool can be utilized as last resort to ensure information came over correctly.
4. Bill for your visits in HHAeXchange.
5. Run the following reports.



Home

Getting Started

What's New

Frequently Asked Questions

Troubleshooting

Training Videos

Documentation

API

V5 Flat File

Contact and Support

You are here: [Documentation](#) / [V5 Flat File](#) / Best Practices for Integration and EVV Compliance

Best Practices for Integration and EVV Compliance

By adhering to these technical best practices, agencies can ensure compliance with EVV requirements and minimize errors in visit records and billing processes.

Diagnosis Codes

EVV Compliant Visits

- **Required Data:** An EVV-compliant visit must include:
 - A valid clock-in and clock-out time
 - The method used to confirm the visit, such as:
 - Call-In/Out Phone Number (for Telephony confirmation)
 - Call-In/Out Latitude and Longitude (for Mobile App confirmation)
 - Service Address In/Out
- **Manual Confirmation:** If the visit record is missing one or more of the above confirmation methods, it is considered manually confirmed, and visit edits should be transmitted.
- **Matching Visit and EVV Times:** The visit start and end times should match the EVV (Electronic Visit Verification) start and end times. If there are discrepancies, transmit visit edits to align the data.

Invoicing Guidelines

Overlapping Schedule and Visit Times

Overnight Visits

Rate Management and Billing

Rebilling Guidelines and Submission Type Field Usage

Visit Edits



Third-Party EVV (EDI) Providers

Providers should ensure the following are complete and accurate.

Key EVV Elements HHAeXchange Checks



EVV check-in time



EVV check-out time



EVV method



Service location



GPS/phone verification
where applicable

Pennsylvania Additional Logic Requirements



Visits crossing midnight



Visit edits / manual
adjustment justification



Matching EVV times to
billing visit times



Accurate EVV data supports compliance, reduces claim denials, and ensures timely payments.

› Third-Party EVV (EDI) Providers: Prebilling Report

- **Prebilling Exceptions Common Holds:**

- Authorization mismatches
- Insufficient auth units
- Wrong procedure codes
- Overbilling attempts

- **Action Required:**

- Verify auths with payer
- Correct procedure codes
- Resend corrected visits

 Prebilling Report



Top issues / holds:

- No authorization
- Insufficient units to bill
- Wrong service code/procedure code
- Overbilling attempts

Best practice:

Correct issues at the source in the third-party system whenever possible, then resend.



[Prebilling Problems and Resolutions](#)

Third-Party EVV (EDI) Providers: Prebilling Report

Navigate to **Billing > Prebilling**



Prebilling Review (Internal)

Page 1 of 55

Report Date: 05/27/2026 02:36 PM

Sr#	Patient Branch	Date	Admission ID	Patient Name	Office Name	Contract	Phone No.	Caregiver Code	Caregiver Name	Service Code	Coordinators	Patient Team	Scheduled Time	Visit Time	Total Scheduled Hours	Discipline	TF	Problem	HHAX Visit ID
1		1/9/2026									Default		12:00 AM-12:00 AM		0.00	PCA		Caregiver Compliance, Incomplete Confirmation, Not Authorized (Insufficient Authorization), Missing Service Portal Approval	1741906735
2		1/5/2026									Default		03:00 PM-05:00 PM		2.00	PCA		Caregiver Compliance, Incomplete Confirmation, Not Authorized (Authorization not available)	1741906537
3		1/7/2026									Default		03:00 PM-05:00 PM		2.00	PCA		Caregiver Compliance, Incomplete Confirmation, Not Authorized (Authorization not available)	1741906543
4		1/9/2026									Default		03:00 PM-05:00 PM		2.00	PCA		Caregiver Compliance, Incomplete Confirmation, Not Authorized (Authorization not available)	1741906548
5		1/5/2026									Default		10:00 AM-12:00 PM		2.00	PCA		Caregiver Compliance, Incomplete Confirmation, Not Authorized (Authorization not available)	1741906610
6		1/5/2026									Default		12:00 AM-		0.00	PCA		Caregiver	1741906727

➤ Third-Party EVV (EDI) Providers: Billing Review Report

- **Billing Exceptions Common Holds:**
 - Pending billing of additional shifts
 - Invoice grouping issues
 - Invalid diagnosis codes
- **Please Note:**
 - Medicaid billing rules require certain visits bill together properly.

 **Billing Review Report**

Purpose:
Identify billing review holds that must clear before claims are created.

 **Top issues / holds:**

- Pending Billing of Additional Shifts on Same Day
- Same Day / Service Code must be billed on same invoice
- Invalid or unbillable diagnosis code

Best practice:
Follow invoicing guidelines; some holds require corrections in the vendor system.

 **Billing Review Problems and Resolutions**

» Third-Party EVV (EDI) Providers: Billing Review Report

Navigate to **Billing** > **Billing Review**



Billing Review (Summary View)

Page 1 of 1

Report Date: 05/27/2026 02:41 PM

View Holds For: E-Billing

Group By: Contract

Contract: All

On Hold Reason:
Billing by Export Code
Greater than 24 hours,
Discharge Date elapsed, DX
Code May Fail Specificity
Guidelines, Missing
Authorization Number,
Missing Export Code,
Missing Medicaid Number or
Medicaid Number didn't
meet the validation
configured at office level,
Missing Patient Address,
Missing Patient City, Missing
Patient SSN, Missing Patient
State, Missing Primary
Diagnosis, Pending billing of
additional shifts on same
day, Review Contract Start
Date and Alt Patient
Number, Visit cannot have
temp authorization, Visit
should not be placed on
Manual Hold, Visits on same
day/service code must be
billed on same invoice

Patient First Name:

Patient Last Name:

Batch Number:

Invoice Number:

Coordinator: All

Visit From Date:

Visit To Date:

Service Code:

Invoice From Date: 2026-02-27

Invoice To Date: 2026-05-27

Display Zero Results: No

Office: UMA healthcare ,UMA MI
office,UMA health care
training

Note : **On Hold Reason** filter does not apply to Mileage cases.

Contract	Total Visits	Total Visits (Hourly)	Total Visits (Daily)	Total Visits (Visit)	Total Visits Amount on Hold	Total Mileage	Total Mileage Amount on Hold	Total Amount on Hold
Life Care Demo Payer (KHC)	3	3	0	0	\$165.00	0	\$0.00	\$165.00
Total:	3	3	0	0	\$165.00	0	\$0.00	\$165.00

➤ Third-Party EVV (EDI) Providers: Claim Status Report

- **Providers must actively monitor:**
 - Rejected Claims
 - 999 rejections
 - 277CA rejections
 - Failed submissions
- **Navigate:**
Reports> Billing> Claim Status Report



Claim Status Report

Purpose:

View claim status and payer responses at the visit level.

What to review

- Report > Billing > Claim Status Report
- 999 / 277CA response status
- Accepted 999 does not mean paid

Best practice:

Track responses until the claim is accepted or the rejection is resolved.



[View Claim Status](#)
[999/277CA](#)

➤ Third-Party EVV (EDI) Providers: Claim Status Report

Navigate to **Report > Billing> Claims Status Report**

Invoice Number	ThirdParty Invoice Number	Invoice Date	Batch Number	Claim Batch Number	Visit Date	Patient Number	Medicaid Number	Patient Name	OfficeName	CaregiverName	Visit	Billed Hours	Service Code	Billed Units	BilledRate	Travel Time Hours	Travel Time Rate	Over Time Hours	Over Time Rate	Billed Amount	Contract	Export Status	Ebilling Hold	Claim Status	Claim status reason	Denial Remittance Code1_Descriptions	DenialRemittanceCode2_Descriptions	DenialRemittanceCode3_Descriptions	ThirdParty VisitID	HHA Visit ID	Last Exported Date
600431		12/23/2025	44897KHCZ00204	CLMKHCZ5026074489700170	3/27/2026				UMA healthcare		1415-1515	1:00	T1019	4	\$30.00		\$30.00		\$0.00	\$30.00	Life Care Demo Payer (KHC)	Yes	N	Pending						1720370014	4/21/2026
600431		12/23/2025	44897KHCZ00204	CLMKHCZ5026074489700170	3/2/2026				UMA healthcare		1415-1515	1:00	T1019	4	\$30.00		\$30.00		\$0.00	\$30.00	Life Care Demo Payer (KHC)	Yes	N	Pending						1720370015	4/21/2026
600419		12/15/2025	44897KHCZ00203	CLMKHCZ5026074489700170	2/27/2026				UMA healthcare		0800-0900	1:00	S5130	4	\$20.00		\$20.00		\$0.00	\$20.00	Life Care Demo Payer (KHC)	Yes	N	Pending						1731509220	4/21/2026
600436		12/23/2025	44897KHCZ00204	CLMKHCZ5026074489700170	2/18/2026				UMA healthcare		1047-1117	0:20	T1019	1.33	\$30.00		\$30.00		\$0.00	\$10.00	Life Care Demo Payer (KHC)	Yes	N	Pending						1724751460	4/21/2026
600436		12/23/2025	44897KHCZ00204	CLMKHCZ5026074489700170	2/5/2026				UMA healthcare		1138-1208	0:30	T1019	2	\$30.00		\$30.00		\$0.00	\$15.00	Life Care Demo Payer (KHC)	Yes	N	Pending						1724765018	4/21/2026
600436		12/23/2025	44897KHCZ00204	CLMKHCZ5026074489700170	1/1/2026				UMA healthcare		1401-1431	0:30	T1019	2	\$30.00		\$30.00		\$0.00	\$15.00	Life Care Demo Payer (KHC)	Yes	N	Pending						1724778691	4/21/2026
600436		12/23/2025	44897KHCZ00204	CLMKHCZ5026074489700170	12/3/2025				UMA healthcare		1550-1805	2:15	T1019	9	\$30.00		\$30.00		\$0.00	\$67.50	Life Care Demo Payer (KHC)	Yes	N	Pending						1725828675	4/21/2026
600436		12/23/2025	44897KHCZ00204	CLMKHCZ5026074489700170	12/3/2025				UMA healthcare		1545-1800	2:15	T1019	9	\$30.00		\$30.00		\$0.00	\$67.50	Life Care Demo Payer (KHC)	Yes	N	Pending						1722336459	4/21/2026
600436		12/23/2025	44897KHCZ00204	CLMKHCZ5026074489700170	12/1/2025				UMA healthcare		1630-1700	0:30	T1019	2	\$30.00		\$30.00		\$0.00	\$15.00	Life Care Demo Payer (KHC)	Yes	N	Pending						1726059210	4/21/2026

Third-Party EVV (EDI) Providers: How Compliance is Tracked



EDI Providers Track Compliance By...

Before data is sent to HHAExchange:

Confirming EVV data is complete and correct before it is sent from the third-party system.

Ensuring caregivers successfully clock in and out using the vendor-supported EVV method.

Keep original EVV start/end times unchanged (**no auto-rounding**).

Running vendor-side reports to confirm IVR phone numbers, GPS coordinates, caregiver IDs, and visit details are present.

Correcting errors at the source in the third-party system, then resending the visit when needed.

Using vendor tools first; using the HHAX EDI Tool only as a last-resort check.

VS



HHAExchange Tracks Compliance By...

After data is sent to HHAExchange:

Confirming whether required EVV data is present and complete after the visit imports into HHAX.

Reviewing whether the visit has successful electronic clock-in and clock-out data.

Comparing verified/confirmed visit times against original EVV clock-in/out timestamps.

Checking method-specific EVV details, such as IVR phone number or Mobile latitude/longitude.

Reporting visits as manual/non-compliant when key EVV data is missing, incomplete, or changed after capture.

Monitoring imported visits through HHAX reports after the data is in the system.

Key Takeaway: Third-party EDI providers must ensure EVV data is accurate and compliant before it reaches HHAExchange. After import, HHAX validates the data, applies PA compliance rules, and reports any issues.



Reports & Compliance Monitoring

> State Aggregation Report

Daily review confirms which EVV records reached the PA aggregator, and which failures must be resolved before billing

PURPOSE

Your daily EVV receipt

Shows whether confirmed EVV data was accepted, still processing, or failed.

Only bill after a Success response.

RECORD STATUS



Success

Accepted by the aggregator

Ready to move forward with billing workflow



Pending

Still processing

Monitor until it updates to Success or Failed



Failed

Action required

Use the error message as your fix-it list

DAILY REVIEW

1 Run all 3 sections

2 Filter to Failed first

3 Read Error Message

4 Fix or contact Support

Best practice: assign one staff owner for this daily check.

RUN ALL THREE REPORT SECTIONS

A visit may fail because of caregiver, patient, or visit data: review each section before billing.

Caregiver

Patient

Visits

> State Aggregation Report

Navigate to **Report > Exception Report > State Aggregation Report**

NPI Number	Visit Date	Caregiver Name	Patient Name	Procedure Code	Visit Start Time	Visit End Time	Call Assignmer	Call Type	Record Status	Last Export Date	Error Message
1234567890	07/16/2025	Caregiver, Caregiver	Patient, Patient	S5125	07/16/2025 1000	07/16/2025 1500	Time In	Telephony	Success	07/17/2025	
1234567890	07/16/2025	Caregiver, Caregiver	Patient, Patient	S5125	07/16/2025 1000	07/16/2025 1500	Time Out	Telephony	Success	07/17/2025	
1234567890	07/17/2025	Caregiver, Caregiver	Patient, Patient	S5125	07/17/2025 1000	07/17/2025 1500	Time In	Telephony	Failed	07/23/2025	Worker not found
1234567890	07/17/2025	Caregiver, Caregiver	Patient, Patient	S5125	07/17/2025 1000	07/17/2025 1500	Time Out	Telephony	Failed	07/23/2025	Worker not found
1234567890	07/18/2025	Caregiver, Caregiver	Patient, Patient	S5125	07/18/2025 1000	07/18/2025 1500	Time In	Telephony	Failed	07/23/2025	Worker not found
1234567890	07/18/2025	Caregiver, Caregiver	Patient, Patient	S5125	07/18/2025 1000	07/18/2025 1500	Time Out	Telephony	Failed	07/23/2025	Worker not found
1234567890	07/21/2025	Caregiver, Caregiver	Patient, Patient	S5125	07/21/2025 1000	07/21/2025 1502	Time In	Telephony	Failed	07/23/2025	Worker not found
1234567890	07/21/2025	Caregiver, Caregiver	Patient, Patient	S5125	07/21/2025 1000	07/21/2025 1502	Time Out	Telephony	Failed	07/23/2025	Worker not found
1234567890	07/22/2025	Caregiver, Caregiver	Patient, Patient	S5125	07/22/2025 1001	07/22/2025 1500	Time In	Telephony	Failed	07/23/2025	Worker not found
1234567890	07/22/2025	Caregiver, Caregiver	Patient, Patient	S5125	07/22/2025 1001	07/22/2025 1500	Time Out	Telephony	Failed	07/23/2025	Worker not found
1234567890	07/01/2025	Caregiver, Caregiver	Patient, Patient	S5125	07/01/2025 0824	07/01/2025 1601	Time In	Mobile	Success	07/02/2025	
1234567890	07/01/2025	Caregiver, Caregiver	Patient, Patient	S5125	07/01/2025 0824	07/01/2025 1601	Time Out	Mobile	Success	07/02/2025	
1234567890	07/02/2025	Caregiver, Caregiver	Patient, Patient	S5125	07/02/2025 0806	07/02/2025 1601	Time In	Mobile	Success	07/03/2025	
1234567890	07/02/2025	Caregiver, Caregiver	Patient, Patient	S5125	07/02/2025 0806	07/02/2025 1601	Time Out	Mobile	Success	07/03/2025	
1234567890	07/03/2025	Caregiver, Caregiver	Patient, Patient	S5125	07/03/2025 0800	07/03/2025 1601	Time In	Mobile	Success	07/04/2025	

Resource: [PA MCO EVV Common Aggregation Failed Responses](#)

> EVV Compliance Summary Report

Use this weekly to identify which contracts or payers need attention before compliance issues impact billing.

PURPOSE

High-level EVV health check

Shows EVV compliance by contract for the selected time period, helping teams spot payer or contract-level risk early.

% Compliance

Visits without
EVV exceptions

% Exceptions

Visits with EVV
exceptions

Recommended cadence: Weekly

WHAT TO REVIEW

1 Contracts below target

Prioritize contracts or payers with lower compliance percentages.

2 Exception percentage

Use % Exceptions as the non-compliance indicator for follow-up.

3 Confirmed vs. compliant visits

Compare confirmed visits to compliant visits to size the issue.

4 Missed and billed visits

Check whether missed visits or billed visits are driving patterns.

➤ EVV Compliance Summary Report

Navigate to **Report > EVV Compliance Reports > EVV Compliance Summary Report**

	A	B	C	D	E	F	G	H	I	J
1		MCO	Total Visits	Total EVV Compliant Visits	Confirmed Visits	Billed Visits	Missed Visits	Visits with Exceptions	% Exceptions	EVV Compliance Percentage
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		Total:	11,642	9,355	10,881	10,131	7	1,526	14.02%	85.98%
10										



EVV Compliance by Caregiver Report

Use this weekly to identify caregivers who may need coaching, follow-up, or additional EVV support.

PURPOSE	WHAT TO REVIEW
Caregiver-level visibility Shows compliance percentages and exception counts by caregiver, making it easier to spot repeat EVV capture issues. % Compliance Red flag for coaching Counts How many visits are impacted Recommended cadence: Weekly	1 High exception rates Start with caregivers who have the highest % Exceptions. 2 Exception volume Validate whether the issue is isolated or affecting many visits. 3 Repeat patterns Look for missed clock-ins, missed clock-outs, or manual adjustments. 4 Progress over time Rerun weekly to see if coaching is improving EVV adoption.



EVV Compliance by Caregiver Report

Navigate to **Report > EVV Compliance by Caregiver Report**



EVV Compliance By Caregiver (New)

Page 1 of 22

Report Date: 01/06/2025 10:21

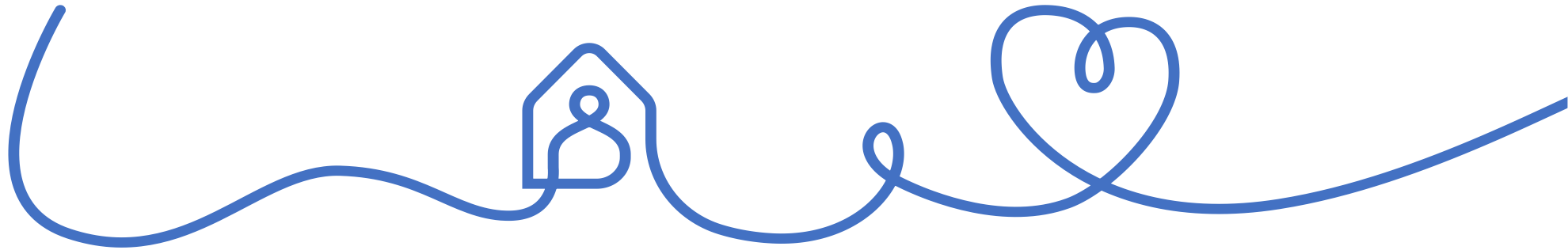
Office(s):		From Date: 12/28/2024	To Date: 1/3/2025
Caregiver: All		Type of Service: Non-Skilled	Coordinator: All
Discipline(s): All		Service Code(s): All	Contract(s): All
Caregiver Location(s): All		Caregiver Team(s): All	Caregiver Branch(es): All
Include Type: All			

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				7	7	5	2	0	2	28.57%	71.43%
2				7	5	0	2	0	5	100.00%	0.00%
3				7	7	4	2	0	3	42.86%	57.14%
4				7	7	7	2	0	0	0.00%	100.00%
5				5	4	4	0	0	0	0.00%	100.00%
6				7	7	7	2	0	0	0.00%	100.00%
7				7	7	5	2	0	2	28.57%	71.43%
8				7	7	6	2	0	1	14.29%	85.71%
9				7	4	4	2	3	0	0.00%	100.00%
10				5	5	5	2	0	0	0.00%	100.00%

➤ Other Compliance Reports

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

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



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 Maintenance

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



Third-Party (EDI)

EDI providers must ensure EVV data is accurate & compliant before it reaches HHAEExchange.



Reports & Compliance Monitoring

Use the Reports to review individual visits and EVV Compliance by Caregiver to monitor trends.





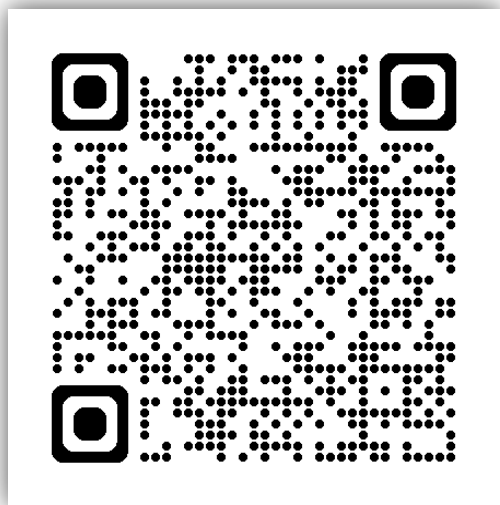
RESOURCES

State Info Hub

Provider Information Center

- To ensure you stay up to date on all the information, please visit our Pennsylvania Information Center. This State Info Hub will be your primary source of information throughout this implementation such as process guides, training videos and interactive walkthroughs, including:
 - Training for Employees using EVV

[Pennsylvania Info Center](#)



A screenshot of the HHAeXchange website's Pennsylvania Home Health Information Center. The page features a blue header with the HHAeXchange logo and navigation links for Homecare Software, Technology, Resources, and Company, along with a 'Request Your Demo' button. The main content area has a dark blue banner with the title 'Pennsylvania Home Health Information Center' and a 'Provider Portal Questionnaire' button. Below this, there's a 'TABLE OF CONTENTS' sidebar with links to Overview, Benefits, Training, EDI Process, FAQ, Services in Scope, and Contact. The main content area includes a section on 'Claims Billing and EVV Implementation for Pennsylvania's Home Health Care Services (HHCS)', explaining the partnership with Managed Care Organizations (MCOs) and the benefits of the HHAeXchange Portal. It also provides a link to the Provider Enrollment Form and information on Community HealthChoices (CHC) or EPSDT. A final section titled 'What are the key benefits of the HHAeXchange Portal to homecare agencies?' lists five key features: FREE Electronic Visit Verification (EVV) tools, Open Model EDI Integration with 3rd Party EVV Vendors, Real-time, two-way messaging with each plan, Receive recipient demographics, authorizations, and plan of care electronically, and Pre-bill scrubbing to ensure clean claims and accelerate revenue cycle. An 'IMPORTANT DATES' sidebar lists the Technical Go-Live on October 3, 2024, and the Provider Go-Live on November 1, 2024.

➤ Provider Resources: HHAeXchange Knowledge Bases



Provider Knowledge Base

<https://knowledge.hhaexchange.com/enterprise/Content/Home/Home-N.htm>



Caregiver Knowledge Base

<https://knowledge.hhaexchange.com/caregiver/Content/Home/Home-CG.htm>



**Third-Party EVV (EDI)
Knowledge Base**

<https://knowledge.hhaexchange.com/edi/Content/Home/Home-C.htm>

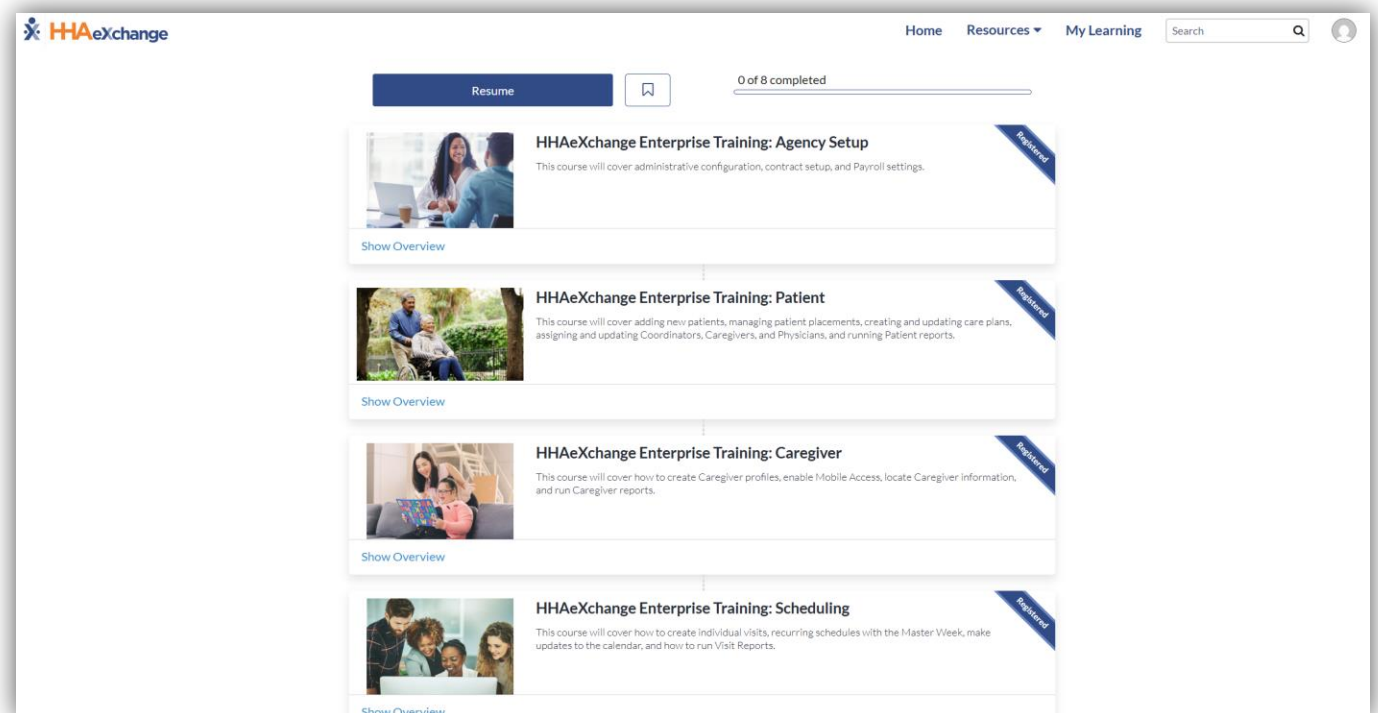
» HHAeXchange University

Onboarding Program Available

- HHAeXchange University is now available for providers to have a foundational overview of key topics such as:
 - Patient & Caregiver Management
 - Agency Setup
 - Visit Maintenance
 - Billing



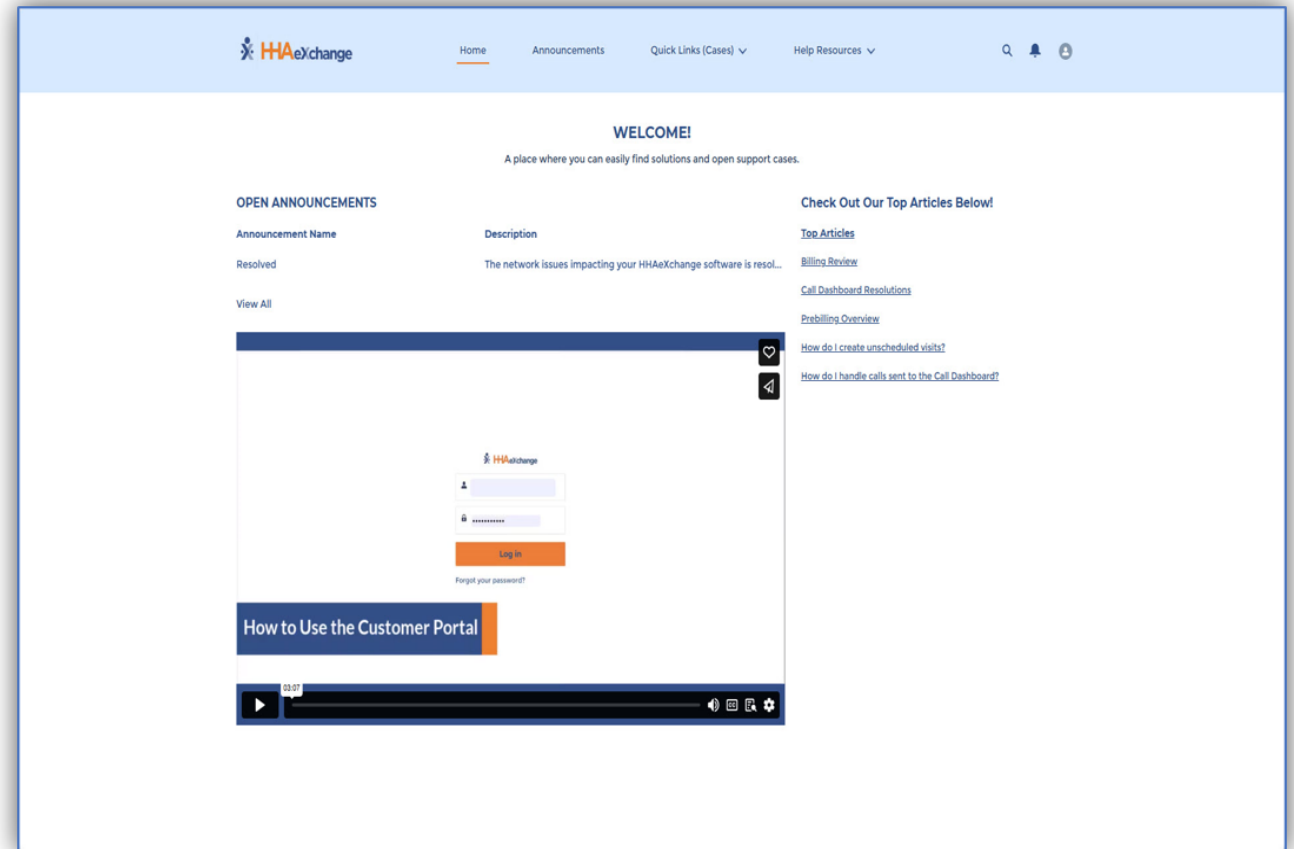
<https://university.hhaexchange.com>



» Client Support Portal

Program Provider Support

- If you require additional support, use our brand-new client support portal to request help.



<https://hhaexchange.my.site.com/s/login/>

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 displays the 'Upcoming HHAeXchange Customer Events' page. At the top, a header reads 'Upcoming HHAeXchange Customer Events' with a subtext: 'We look forward to seeing you at one of our customer training webinars or in-person training events.' Below this is a search bar and a 'Filter by Event Type' dropdown. The main content area features six event cards. The first card shows an orange map of Alaska and is titled 'LIVE TRAINING ON CONFLICT MANAGEMENT' for June 3, 2026, at 2:00 PM ET, with the subtitle 'Conflict Management Made Easy'. The second card shows a woman at a laptop and is titled 'Lunch & Learn: Clinical Docs with Teavy' for every other Friday at 12:30 PM ET. The third card shows a handshake icon and is titled 'Daily Onboarding Office Hours' for every weekday at 11 AM ET. The fourth card features the HHAeXchange logo and is titled 'Teach Me Tuesdays: Admin Setup' for a live training on May 19, 2026, at 2:00 PM ET. The fifth card shows a map of the United States and is titled 'Visit Maintenance: No Schedule Opening' for a live training on May 20, 2026, at 1:00 PM ET. The sixth card also features the HHAeXchange logo and is titled 'Teach Me Tuesdays: Scheduling' for a live training on May 26, 2026, at 2:00 PM ET. Each card includes a 'Live Trainings' button.

Questions?

thank you

Please provide us your feedback!