



How to Choose the Right Homecare Software

A Practical Guide for Growing Agencies

Why This Guide?

Choosing the right homecare management software is an important decision, and it can feel overwhelming. Maybe you're investing in an agency management solution for the first time. Maybe you're switching from a system that just didn't deliver. Either way, there's a lot to consider, and let's be honest, there's always that nagging fear of choosing wrong. Especially when the stakes include process overhauls and change management for your employees.

At HHAeXchange, we've worked with thousands of agencies at every stage of growth—and we know that choosing software isn't just about features. It's about solving real workflow gaps that slow you down, create compliance risks, and limit your ability to grow.

That's why we created this guide: to help you make the right choice for your agency.

No fluff. No jargon. Just the facts you need to confidently evaluate your options, compare vendors, and choose a solution that helps your business grow, get paid faster, and stay compliant.



What's at Stake: The Cost of Doing Nothing

Homecare software is an investment—but staying the same will also cost you. The longer agencies rely on manual processes or underperforming systems, the more time, revenue, and reputation they put at risk.

Take administrative workflows, for example. Without automation, your staff may be spending hours each week on tasks that could be streamlined or eliminated entirely. One HHAeXchange customer, Countrywide Home Care, cut their billing and payroll processing time from 24 hours a week to just two. This freed up 22 hours for higher-impact work.

And time isn't the only thing on the line. Agencies without a high-quality homecare management platform often struggle with:

- Denied claims due to missing documentation or authorization mismatches
- Underutilized service hours that go unbilled
- Audit risks from inconsistent visit verification
- Compliance violations that trigger payer penalties

We've seen agencies recoup hundreds of thousands of dollars simply by replacing manual billing processes with automated checks and built-in compliance safeguards.

But the cost of inaction isn't just financial. It's reputational, too.

As more payers enforce strict EVV compliance thresholds—some requiring 100% accuracy—non-compliant agencies are being placed on corrective action plans, and in some cases, not getting paid at all for services already delivered.

We understand that choosing a new software partner is a big decision. But doing nothing carries its own risks, ones that grow more costly the longer they're ignored.

What to Look for in a Homecare Management Platform

There are multiple software solutions on the market for homecare agencies, and each software has a host of features that promise to revolutionize your homecare operations. But what tools actually make the difference in terms of time savings for your staff, improved client care, increased cash flow, and keeping your agency audit-ready?

We’ve put together our list of must-have features here. We believe these are the core functions that can move the needle for agencies looking to improve efficiency and grow. This list is based on the typical homecare agency workflow and our knowledge of where operational gaps tend to emerge.

Caregiver and Staff Enablement Functionality

Being compliant starts before the first visit. Caregiver compliance is complex—onboarding, HR, medical requirements, exclusion checks—and without the right tools, it’s easy for tasks to slip through the cracks. These are the tools that can make those processes easier:

Exclusion List Checks

Instantly screen caregivers against federal and state exclusion lists. Run bulk checks and automate them monthly to stay compliant—without the manual effort.

Documentation Management

Securely store caregiver certifications, client records, HR paperwork, and compliance documents in one system. Digital storage ensures quick retrieval, full audit trails, and HIPAA-compliant security.

Compliance Notifications

Automate reminders for both caregivers and administrators around key deadlines—like expiring CPR certifications or training renewals—so nothing gets missed.

Partner Integrations

Connect with trusted third-party systems like eLearning platforms and occupational health providers to further streamline onboarding and compliance workflows.

Scheduling and Visit Management Tools

Accurate, efficient scheduling is at the heart of every agency’s operations. Consider a tool that has these features to help you optimize caregiver utilization, meet client needs, and stay aligned with authorizations.

Real-Time Updates

Coordinators get instant visibility into caregiver availability and client updates, making it easy to adjust the schedule on the fly.

Automated Scheduling

Create recurring shifts that are directly tied to each client’s authorization and plan of care. This eliminates manual data entry and reduces errors.

Simple Patient-Caregiver Matching

Match caregivers with clients based on skills, certifications, preferences, location, and language. This fosters continuity of care and helps improve client satisfaction.

Fill Open Shifts, Fast

Broadcast open shifts to a pool of qualified caregivers using HIPAA-compliant mobile or text notifications to reduce missed visits and administrative time.

Care Delivery and Coordination Tools

Caregivers are on the frontlines—and their experience with your software matters. Does the solution you currently use have a caregiver mobile app that is designed with simplicity and speed in mind, without sacrificing functionality or compliance? Look for an app with the following features:

EVV-Enabled Simplicity

Caregivers can clock in and out in seconds, with accurate GPS or telephony data automatically captured and sent to the home office.

Mobile Scheduling & Communication

Caregivers can view schedules, accept new cases, and access care plans on the go. They can chat with the office and receive real-time updates.

Thorough Visit Documentation

Document care tasks through audio notes, text, or photos. Caregivers can log completed duties, escalate concerns, and confirm visits—all from their mobile device.

Self-Managed Compliance

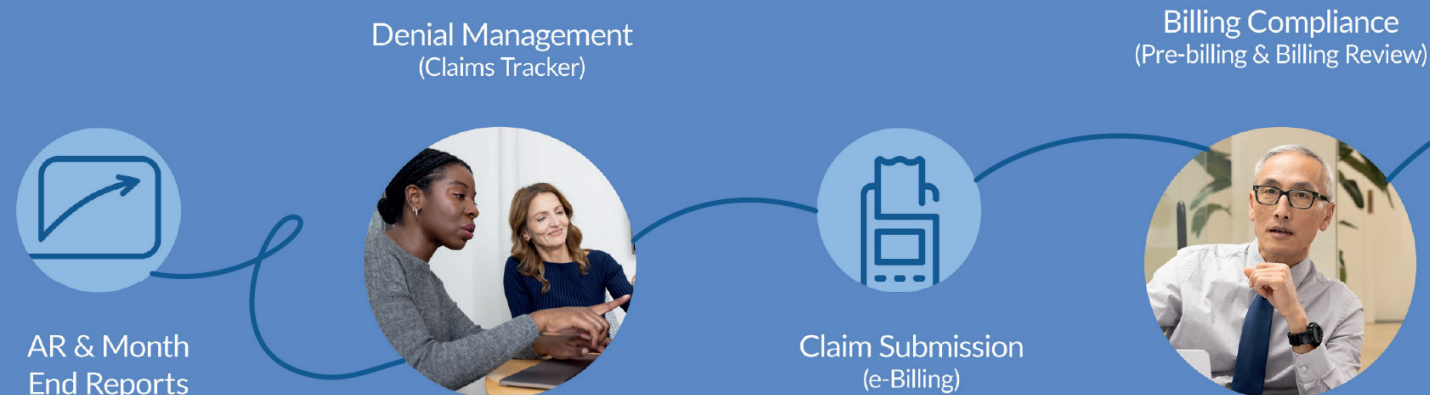
Caregivers can view their own outstanding compliance tasks (like missing credentials or training) and take immediate action—freeing your admins from manual follow-ups.



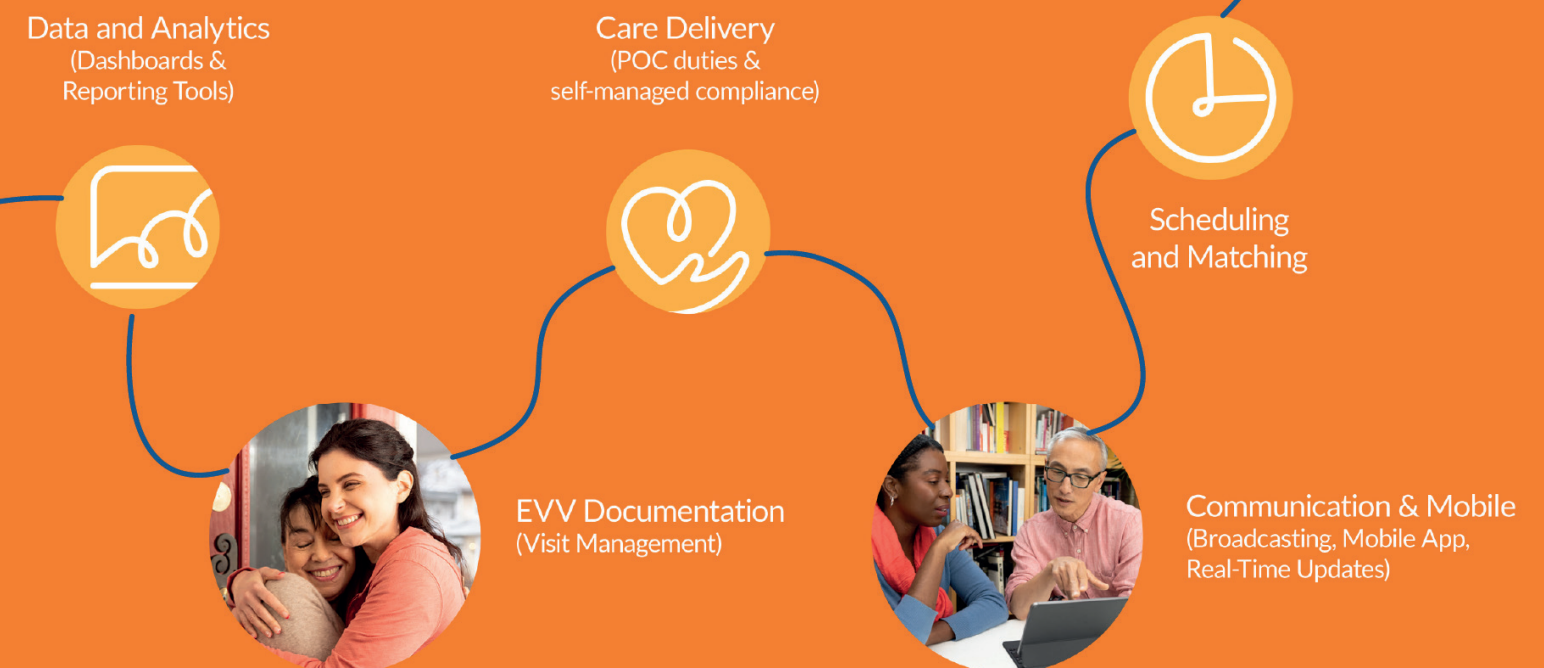
Where Care, Compliance, and Revenue Meet

The journey to better member outcomes starts with one connected system.

Empowering the Caregiver Journey



Protecting Revenue and Financial Performance



Driving Compliance and Operational Integrity

Data and Analytics Tool

You already have the data—now it's time to unlock its value. Look for a tool with a comprehensive data dashboard that will help you gain visibility into operations, compliance, billing, and performance. The following are all helpful reports:

EVV Compliance Monitoring

Track which caregivers are consistently late, where compliance lags by office, and which shifts might be at risk of non-billable status.

Under/Over-Utilized Authorizations

Visual dashboards reveal whether clients are receiving too few or too many authorized hours—helping you optimize care and billing.

Staffing Optimization

Balance caregiver schedules to reduce overtime and burnout. Identify gaps in coverage and act quickly to reallocate staff.

Revenue & Operational Performance Dashboards

View weekly, quarterly, or annual trends in revenue, visit volume, payer performance, and caregiver productivity—all in one place.

Expiring Authorizations Tracker

Drill into soon-to-expire authorizations to avoid service disruptions and ensure timely care continuation.

Billing and Revenue Cycle Management Tools

Billing errors and slow reimbursements are common pain points in homecare—but they don't have to be. Look for features that will help your agency bill cleanly and get paid faster.

Pre-Billing Compliance Checks

Automatically flag missing documentation or non-compliant visits before claim submission—saving you from denials and resubmissions.

Automated Claim Submissions

Once a visit is completed and verified, the 837 file is generated and sent securely. When the 835 is received, it's matched automatically for faster reconciliation.

Denial Management & AR

Quickly resolve denials and work aged receivables with full visibility into payer status and claim activity.

Private Pay Integration

Track, manage, and reconcile private pay alongside Medicaid billing—using a HIPAA- and PCI-compliant platform to safeguard every transaction.

Revenue Cycle Management (RCM) Services

Prefer to offload billing entirely? Outsource RCM services to maximize cash flow and minimize administrative burdens.



A Platform That Grows With You

Whether you're launching your first agency or scaling across multiple locations, **HHaEXchange is built to evolve with your needs.**

From compliance to scheduling, billing to reporting—every feature works together to support your operations and fuel growth.



Pro tip: When comparing vendors, focus on outcomes—not just features. Ask how a platform supports EVV compliance, cash flow, and caregiver retention in one system. That's where real ROI lives.

Why Agencies Choose HHAeXchange

Choosing a homecare management solution isn't just about checking off a features list—it's about finding a true operational partner who understands your unique workflow needs and can grow with you. That's where HHAeXchange excels—we support agencies at every stage of growth.

Whether you're building a new agency from the ground up, scaling into new markets, or optimizing operations across multiple locations, HHAeXchange meets you where you are—and takes you further.

Below are three common areas where agencies often experience the biggest workflow gaps. If you see yourself in one (or more) of these scenarios, here's what we recommend:



If your top priority is empowering your caregivers, you need support across onboarding, scheduling, and care delivery.

We recommend HHAeXchange if you're focused on:

- Scaling a new team or location and want to streamline caregiver onboarding
- Reducing churn by improving the caregiver experience
- Matching caregivers and clients more effectively for better outcomes



If compliance and operational control are your biggest concerns, you need visibility into: EVV, documentation, and audit readiness.

We recommend HHAeXchange if you're focused on:

- Managing multiple payers with complex, shifting compliance requirements
- Visit verification, documentation accuracy, or state audits
- Gaining a clearer view into visit-level operations across your agency



If your agency is feeling the strain of cash flow and claim denials, you need automation and visibility across billing, claims, and AR.

We recommend HHAeXchange if you're focused on:

- Constantly chasing denials, reworking claims, or reconciling payments manually
- Faster reimbursements and more predictable cash flow
- Simplifying private pay alongside Medicaid billing

Which Workflow Do You Want to Focus On?

With HHAeXchange, you don't have to choose between caregiver satisfaction, compliance, or cash flow. We help you connect the dots across your entire operation—from intake to billing and beyond.

No other vendor understands your agency workflow needs like HHAeXchange. We're here to improve your efficiency, deliver measurable value, and support your agency as it grows.

What Success Looks Like

Now, anyone can tell you that their solutions are what your business needs to be successful, but we don't want you to just take our word for it. We would rather you hear directly from our customers about the reality of using our software. Here are just a few of the successes that our customers have experienced:

Ability360 saved \$500,000 in their first year with HHAEExchange Enterprise.

“Having HHAEExchange do these things automatically for us is just amazing. Now we look back and the amount of work that we put into doing all of those tasks before was tremendous. HHAEExchange has made a huge difference to our staff. We have eliminated a total cost of \$400,000 so far and are forecasting another cost savings of \$100,000 before the end of the year.”

Chelsea Garcia, Director of Business Operations at Ability 360

Udac went from spending 80 hours every two weeks on billing to less than one hour.

“I do billing every other week in less than an hour. It's a huge time saver.”

Lola Aune, Director of Human Resources, Udac

Bryan Skilled saved \$400,000 a year because they were able to eliminate the need for costly receivable credit lines.

“I would say the huge time saving benefit overall was when we started using HHAEExchange for billing. That was a major paradigm shift for our agency. It completely changed the dynamic of our office, made us much more operationally efficient, and significantly improved our revenue cycle management process.”

Bryan Madden, General Counsel at Bryan Skilled Home Care

For the Hellenic Foundation, the support and efficiency of the HHAEExchange team made all the difference.

“What we found was most beneficial—what HHAEExchange truly excelled at—was the quality of its implementation team and its support team.”

Tasia Phassos, Community Care Program Manager, Hellenic Foundation

Caremate Wellness recently had a contract audit by Texas Health and Human Services (HHS) and received 98% compliance with no recoupments of reimbursements.

“I would like to give a thanks to HHAEExchange! This week we had our contracts survey with HHSC and received 98% compliance with no recoupments of reimbursement! This is largely due to HHAEExchange and the comprehensive platform you provide. We look forward to continued partnership and goal achievement together!”

Clinton Pinkney, LVN, Director of Client Services

For JCCGCI, HHAEExchange provided critical insights into billing errors, helping to identify \$70,000 worth of non-compliant services.

“To go from manual to automated was incredible. We save about 35 hours per week—that's a full-time position.”

Hudi Falik, Chief Program Officer, JCCGCI

FAQ: Clear Answers to Common Questions

Every homecare agency has unique needs—but a few questions come up time and again when evaluating a new platform. We've compiled answers to help you move forward with clarity and confidence.

How is HHAEExchange priced, and what's included?

HHAEExchange offers pricing based on your agency's size, service lines, and specific needs. Our pricing is structured to scale with your business, and includes access to core functionality like EVV, scheduling, compliance tools, and billing features.

How will my existing data—like client records and caregiver files—be migrated into HHAEExchange?

Our implementation team has deep experience migrating data from a wide range of systems and spreadsheets. We'll help scope your data migration needs during onboarding, provide clear instructions, and support a seamless transfer of client, caregiver, authorization, and visit data. You won't lose visibility or continuity.

Can HHAEExchange integrate with our existing systems (e.g., payroll, training, HR, or CRM)?

Yes! HHAEExchange supports API-level integrations with many of the most popular third-party systems in homecare. Whether it's payroll software, learning management systems, background check providers, or CRMs, we can either connect directly or work with your vendors to ensure data flows efficiently across platforms.

How will our staff and caregivers get trained on the platform?

We offer tailored training during implementation and ongoing support as your team grows. Our training includes live sessions, recorded modules, and easy-to-use guides for both office staff and field caregivers. Everything is designed to match your team's comfort level with technology—whether they're new to homecare software or seasoned pros.

What kind of support will we get after go-live?

You'll have access to a dedicated support team with deep knowledge of homecare operations and state regulations. We offer phone and in-platform ticket support, along with a knowledge base. Plus, our team proactively monitors for issues that could impact your compliance or cash flow—so you don't have to go it alone.

Your Next Step: A Simple Path Forward

If you've made it this far, chances are you can see how HHAeXchange could transform your agency's day-to-day operations—from streamlining scheduling and EVV to simplifying billing and staying audit-ready.

So, what's next?

Book a one-on-one demo with a member of our team.

We'll take the time to understand your agency's unique challenges, walk through the specific workflows that matter most to you, and share a personalized recommendation—no pressure, no hard sell.

Just answers, clarity, and a realistic path forward to help you grow your agency, retain caregivers, and get paid faster.

Request Your Demo—and let's talk about what's possible.



About HHAeXchange

Founded in 2008, HHAeXchange is the leading technology platform for homecare and self-direction program management. Purpose-built for Medicaid home and community-based services (HCBS), the platform connects state agencies, managed care organizations, providers, and caregivers to drive communication, transparency, efficiency, and compliance.

In 2024, HHAeXchange expanded through the strategic acquisitions of Sandata, Cashé Software, and Generations Homecare System, strengthening its commitment to advancing the industry. For more information, visit hhaexchange.com.