



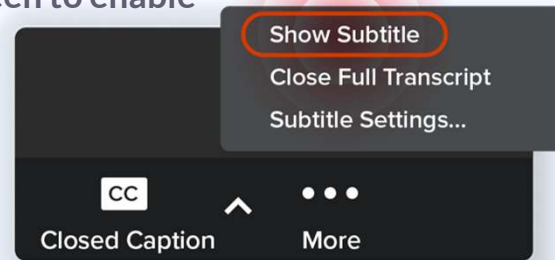
**Our Webinar Will
Begin Shortly**



Accessibility Options

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Michigan Foundations 1: System Setup Training

July 15, 2026



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speakers



Meet Shanieka Naik

- **Role:** Training Specialist
- **Tenure at HHAeXchange:** 1 year
- **Areas of Expertise:** Sponsored Training
- **Fun Fact:** I enjoy travelling & experiencing new foods/cultures.

System Setup

Overview

What this training covers:

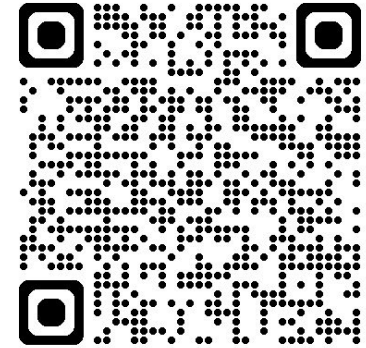
This training is designed to ensure your organization is set up for success before visits ever begin. We'll focus on how to properly configure users, roles, and system access so your team, caregivers, and patients are aligned within the Michigan EVV workflow from day one.

Who should take this training?

- Administrators responsible for system setup and oversight
- Onboarding staff managing user creation and system configuration
- Team members supporting initial EVV implementation and readiness
- Third-Party EVV (EDI) Providers

> Poll

Are you actively using HHAeXchange to track Electronic Visit Verification (EVV)?



Action Required

Complete the HHAeXchange Provider Onboarding Form

Regardless of the EVV solution selected, all impacted providers are required to complete the [HHAeXchange Provider Onboarding Form](#).

Please note that only one onboarding form per agency is required to create your HHAeXchange Portal. Once your portal is created, it will be connected to your relevant Michigan contracts.

Objectives

After today's webinar, you will be able to:



Explain

the Michigan EVV workflow across payer, provider, caregiver, and patient.



Configure

system users, roles, and access within the platform.



Navigate

core system areas required for onboarding and setup.



Understand

how setup decisions impact EVV compliance and visit workflows.



Prepare

their organization for successful EVV adoption from day one.

agenda

- Housekeeping
- Third-Party EVV Integration Requirements
- HHAeXchange System Overview
- User & Access Setup
- Payer & Contract Setup
- Key Takeaways
- Resources
- Questions



Housekeeping

> EVV Overview



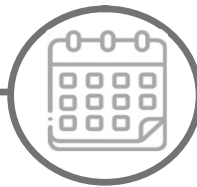
**AGENCY
CONFIGURATION**



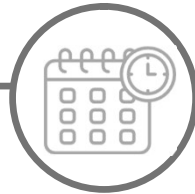
**CAREGIVER
MANAGEMENT**



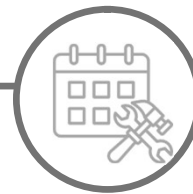
**BENEFICIARY
MANAGEMENT**



SCHEDULING



VISIT CAPTURE



VISIT VERIFICATION
&
MAINTENANCE



BILLING



REPORTING
&
COMPLIANCE
MONITORING

➤ 6 Elements of a Cures Compliant Visit



Who

Beneficiary



Who

Caregiver



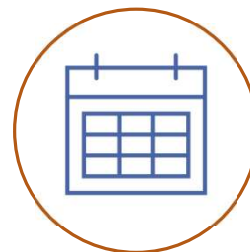
What

Type of
Service



Where

Location
of Service



When

Date of
Service



When

Time of
Service

Note: HHAExchange is committed to providing accessible, ADA-aligned software across its platform. The company incorporates accessibility standards into its applications and regularly updates features to support users of all abilities.

➤ 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

➤ From Risk to Control

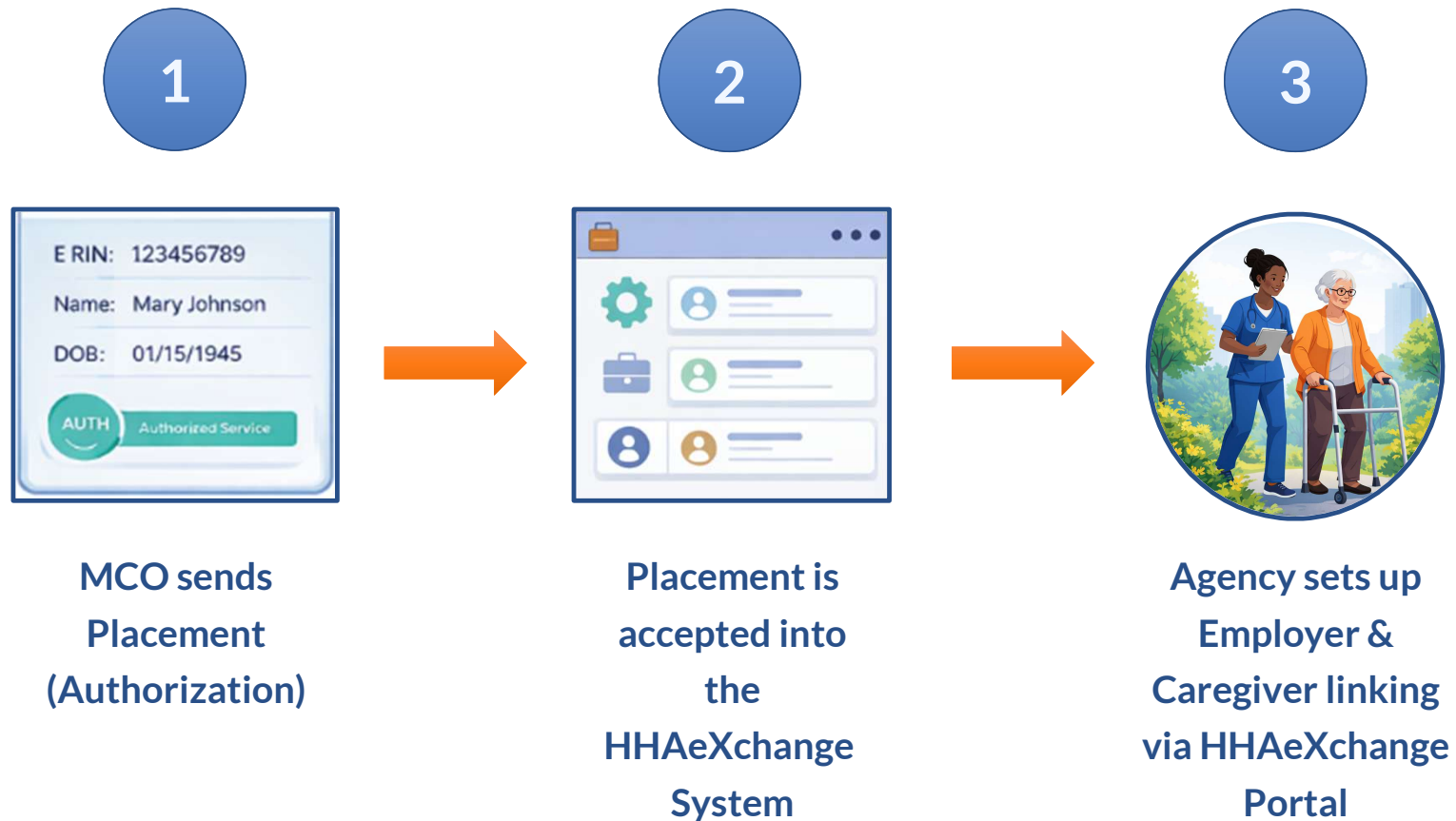
What creates EVV risk:

- Gaps in setup, scheduling, or caregiver readiness
- Misalignment between visits, services, and authorizations
- Inconsistent EVV capture across similar visits

What reduces EVV risk:

- Intentional setup before visits begin
- Consistent scheduling and service alignment
- Clear standards for how EVV is captured and reviewed

➤ Michigan Workflow



➤ 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		

Knowledge Check

You'll see these throughout the presentation!

What's the name of the presenter of this webinar?

A. Alejandra

B. Shanika

C. William

D. Ashley



Third-Party EVV (EDI) Integration Requirements

Third-Party EVV (EDI) Integration Requirements

Integration Requirements:

1. Complete the Third-Party EVV Attestation Form
2. Comply with the HHAeXchange Technical Specifications & Business Requirements
 - [EDI Technical Specifications](#)
 - [Business Requirements](#)
3. Review Authorization Specifications (if applicable – Home Health Only)
4. Submit an EDI Ticket

Visit: <https://www.hhaexchange.com/info-hub/michigan-information-center>

HHAeXchange Homecare Software ▾ Technology ▾ Resources ▾ Company ▾ [Request Your Demo](#)

Michigan Information Center

[Provider Onboarding Form](#)

Electronic Data Interchange (EDI) Overview (Integrating with a 3rd Party Agency Management System)

This overview is geared towards providers who will be using their own EVV solution and not the MDHHS EVV solution. If you have your own EVV vendor, in HHAeXchange's system the vendor will be referred to as an EDI vendor. The information below lists the general requirements and steps to successfully integrate a 3rd Party Agency Management System with HHAeXchange. Electronic Data Interchange (EDI) Providers will be required to comply with both the HHAeXchange Technical Specifications and Business Requirements listed below. After reviewing the specifications and requirements resources, please initiate contact HHAeXchange to begin the integration process.

1. It is critical to complete the Third Party EVV Attestation Form begin the process: [Attestation Form](#)
2. Please click here for the Technical Specification document: [EDI Technical Specifications](#)
3. Please click here for the Business Requirements document: [Business Requirements](#)
4. Please click here for the Authorization Specification: [Web Service API Guide](#) (Home Health only)
5. Submit a ticket to HHAX EDI via the Client Support Portal: <https://www.hhaexchange.com/supportrequest>



HHAeXchange System Overview

➤ HHAeXchange System Overview

What is it?

- The homecare management platform that helps agencies manage key workflows in one system. Functions supported:
 - *Scheduling*
 - *Electronic Visit Verification (EVV)*
 - *Visit review & maintenance*
 - *Compliance monitoring*
 - *Billing & payroll support*

Why does it matter?

- It helps agencies work more accurately and efficiently by connecting key workflows in one system and reducing downstream issues.

How is it used?

- Agencies use HHAeXchange to configure their system, manage visits, monitor EVV compliance, review visit activity, and support billing and payroll processes.

Knowledge Check 1

What should an agency using a third-party EVV vendor do first to begin the integration process?

A. Submit the EDI Technical Specifications review form

B. Review the authorization file layout for the payer

C. Complete the Third-Party EVV Attestation Form

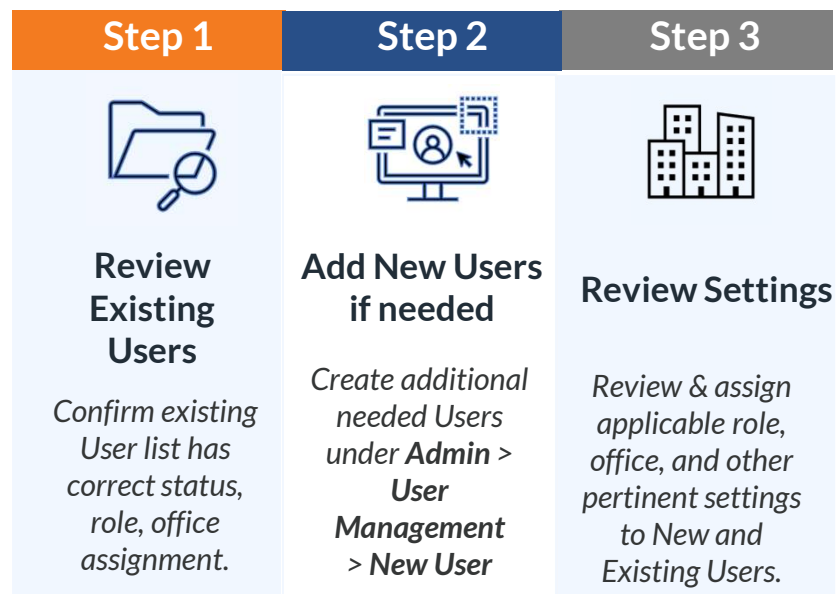
D. Submit a ticket for claim export testing



User & Access Setup

➤ User Setup

- User accounts control system access
- Roles determine permissions
- Office assignment controls data visibility
- Incorrect setup leads to access and workflow issues



Why It Matters? - User setup ensures staff have the right access, permissions, and visibility to complete their work accurately.

Hello SupWFNR

Placements (0 Pending)

Events

System Notifications

Direct Messages

Tasks

Linked Communication

Placements

Pending (0)

Accepted with Temp Service Provider (0)

Staffed (0)

Accepted with No Master Week(0)

Member ^

Admission ID ⇅

Office ⇅

Start Date ⇅

Stop Date ⇅

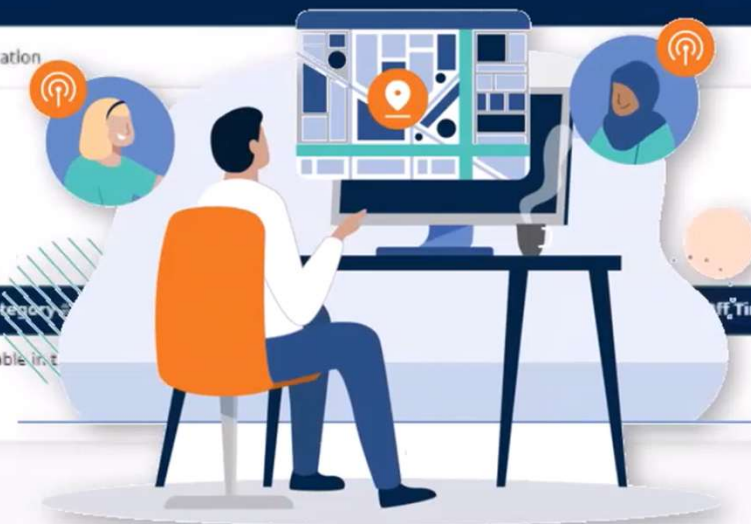
Frequency ⇅

Service Category ⇅

Time ⇅

Payer Name ⇅

No data available in t



How to Create a New User

This video uses the Standard System Terminology

*Your state or payer may utilize different terminology in the platform

➤ Agency & Coordinator Overview

Agency Setup

- Agency Demographics and Identifiers
- Home Landline (IVR) Numbers setup
- Default System settings that impact workflows



Why It Matters? - These settings control how your agency is identified and how staff use the system. Incorrect setup can affect IVR calls and daily workflows.

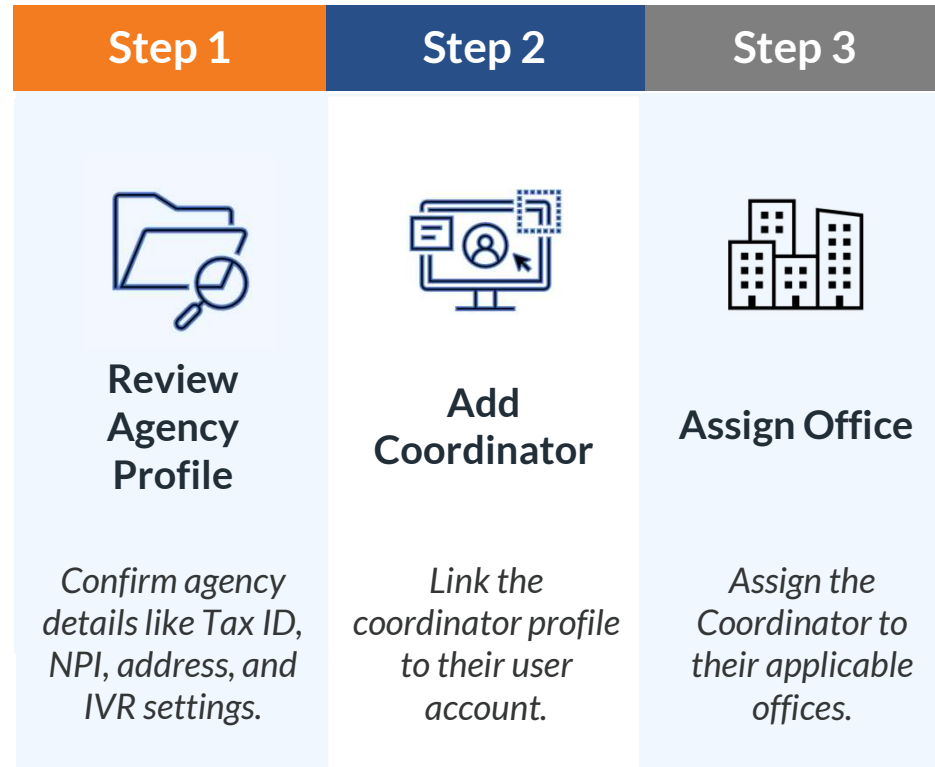
Coordinator Setup

- Coordinators must exist as Users first
- Coordinator Profiles enable Scheduling and Case Visibility
- Office Assignment impacts access



Why It Matters? - Coordinator setup ensures the right staff are linked to scheduling and case visibility so they can manage the appropriate patients and workflows.

> Agency & Coordinator Workflow



Note: Coordinators must exist as System "Users" first.

Hello Snaiktest

- Placements (12 Pending)
- System Notifications**
- Direct Messages
- Tasks
- Linked Communication

Search System Notifications

Priority

All ▾

Status

All ▾

From

mm/dd/yyyy 

To

mm/dd/yyyy

Search

Hello Snaiktest

Placements (12 Pending) **System Notifications** Direct Messages Tasks Linked Communication

Search System Notifications

Priority

All

Status

All

From

mm/dd/yyyy

To

mm/dd/yyyy

Search

➤ Patient (Beneficiary) Setup Workflow

Step 1	Step 2	Step 3
		
Search Existing Patient	Add New Patient	Review & Complete Profile
<i>Confirm patient is not already in the systems before creating a new record.</i>	<i>Patient > New Patient. Enter office & demographics: name, DOB, coordinator, etc.</i>	<i>Review office, coordinator, services, address, and EVV details before scheduling. Click Save.</i>



Note: Patient setup must be complete before scheduling or EVV visits can begin.

Hello billexpert4

ABC

Placements (0 Pending)

Events

System Notifications

Direct Messages

Tasks

Linked Communication

Placements

Pending (0)

Accepted with Temp Caregiver (0)

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 ▴	Contract Name
-----------	----------------	----------	--------------	-------------	-------------	--------------------	----------------	-------------------	----------	----------------	---------------

No data available in table

How to Add a Patient

This video uses the Standard System Terminology

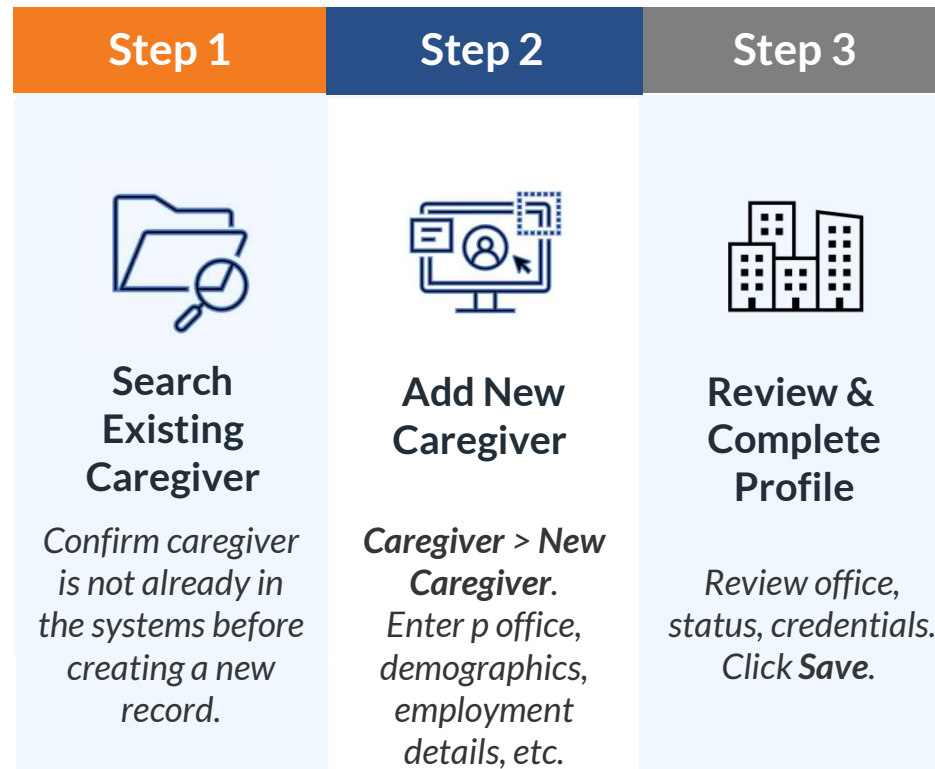
*Your state or payer may utilize different terminology in the platform

[Support Center](#) | Expert Aides 4 [ID# 785] | APP

Enterprise 24.07.01 AWSPRODWEB5 : 443 chrome 127 (Doc Chrome 127) 08/01/24 12:06 PM EST

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> Caregiver Setup Workflow



Note: Caregivers must be active before they can be scheduled or capture EVV visits.

Hello Snaiktest

Placements (7 Pending)

System Notifications

Direct Messages

Tasks

Linked Communication

Search System Notifications

Priority

All ▾

Status

All ▾

From

mm/dd/yyyy



To

mm/dd/yyyy



Search

Knowledge Check 2

Why is proper system setup critical before EVV visits begin?

- A. It allows caregivers to create their own service authorizations
- B. It ensures payroll is processed automatically
- C. It replaces the need for EVV visit capture training

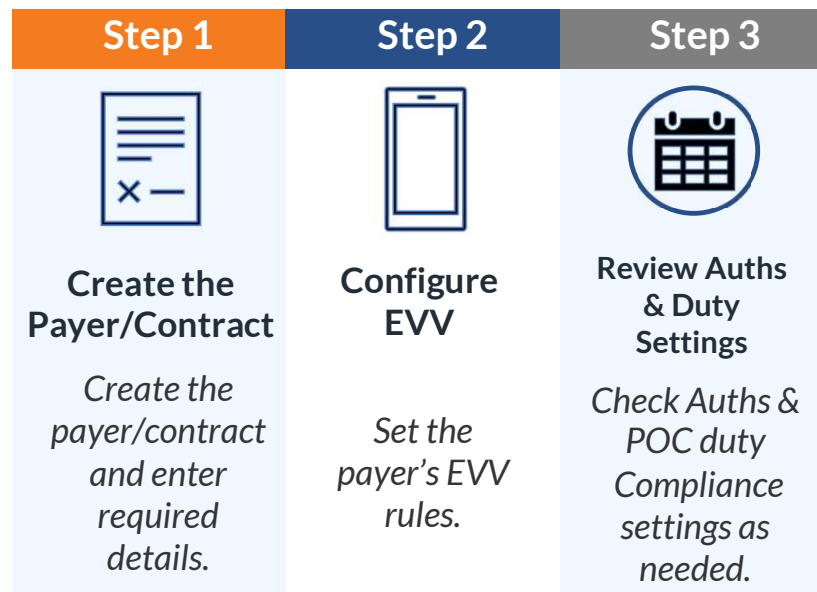
D. It prevents downstream issues with visits, compliance, and user access



Payer & Contract Setup

> Payer & Contract Overview

- Contracts define Billing and EVV rules
- Office assignment determines where Contract applies
- Certain fields lock after saving



Why It Matters? - Contract setup controls billing and EVV rules, so accurate setup helps prevent downstream scheduling, validation, and billing issues.

HHA Exchange - Home

app.hhaexchange.com/ENT2407010000/Common/Home_ns.aspx



Home

Patient

Caregiver

Visit

Action

Billing

Report

Admin

0

Hello expert4

Placements (0 Pending)

Events

System Notifications

Direct Messages

Tasks

Linked Communication

Placements

Pending (0)

Accepted with Temp Caregiver (0)

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	Contract Name
No data available in table											

How to Create a New Contract

This video uses the Standard System Terminology

*Your state or payer may utilize different terminology in the platform

Support Center | Expert Aides 4 [ID# 785] | APP

Enterprise 24.07.01 AWSPRODWEB6 : 443 chrome 127 (Doc Chrome 127) 08/06/24 11:13 AM EST

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Knowledge Check 3

Why is payer and contract setup important in HHAeXchange?

- A. It defines billing and EVV rules and helps ensure services flow correctly through the system
- B. It replaces the need for user and patient setup
- C. It controls how visits are captured on the mobile app
- D. It determines caregiver hiring decisions

> KEY TAKEAWAYS



➤ Key Takeaways

Full Michigan EVV Workflow

Understand the full Michigan EVV workflow and where setup fits.



Users & Roles

Confidently create and manage users and roles.



System Navigation

Navigate key system areas required for onboarding.



Setup Impact

Recognize how setup impacts compliance and daily operations.



Setup Checklist

Leave with a clear checklist for successful system configuration.



RESOURCES



Support Resources

Training Videos:

- [EVV Overview](#)
- [Admin Overview & Topics](#)
- [HHAeXchange Enterprise Training: Agency Setup](#)
- [Admin Setting Videos](#)
- [How to Create an Individual Visit](#)
- [How to Create a Master Week](#)

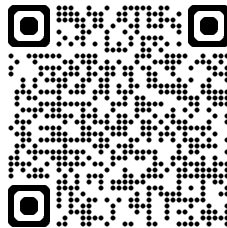
Knowledge Base:

- [System & Admin Configuration Checklist](#)
- [Services Portal User Management Permissions](#)
- [Patient Profile](#)
- [Caregiver Videos](#)
- [Admin Contract Setup Overview](#)
- [Reference Table Management](#)

State Info Hub

Provider Information Center

- To ensure you stay up to date on all the information, please visit our Michigan 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:
 - Services Portal Walkthrough
 - Training for Employees using EVV



<https://www.hhaexchange.com/info-hub/michigan-information-center>

A screenshot of the Michigan Information Center website. The header features the HHAeXchange logo, navigation links for Homecare Software, Technology, Resources, and Company, and a 'Request Your Demo' button. The main banner includes a Michigan map icon, the title 'Michigan Information Center', and a 'Provider Onboarding Form' button. A sidebar on the left contains a 'TABLE OF CONTENTS' with links to Overview, EVV Compliance, MICHIGAN HOME HEALTH FEE FOR SERVICE (FFS), MICHIGAN HOME HELP, MI CHOICE, MI HEALTH LINK, MEDICAID MANAGED CARE PLAN (MHP) AND BEHAVIORAL HEALTH, MI FI / FMS, ELECTRONIC DATA INTERCHANGE (EDI) PROCESS, FREQUENTLY ASKED QUESTIONS, and CONTACT. The main content area is titled 'Overview' and contains text about the Michigan Update starting January 1, 2026, the implementation of the EVV system, and the transition to MI Coordinated Health. It also mentions the 'Open Vendor Model' and the EVV Go-live date for Home Health - Fee for Service (FFS) as of April 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>

➤ Additional Resources

HHAeXchange
Client Support
Portal:

[https://hhaexchange.
my.site.com/s/login/](https://hhaexchange.my.site.com/s/login/)

MI EVV Info:

[www.Michigan.gov/
EVV](http://www.Michigan.gov/EVV)

MI Dept. of
Health & Human
Services
(MDHHS) Email:

[MDHHS-
EVV@Michigan.gov](mailto:MDHHS-EVV@Michigan.gov)

MI Contact
Methods:

- Atypical providers call:
1-800-979-4662
- Typical providers call:
1-800-292-2550
- Beneficiary Help Line:
1-800-642-3195

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](#)

Upcoming HHAeXchange Customer Events

We look forward to seeing you at one of our customer training webinars or in-person training events.

Filter by Event Type



LIVE TRAINING ON CONFLICT MANAGEMENT
JUNE 3, 2026 AT 2:00 PM ET
Conflict Management Made Easy



EVERY OTHER FRIDAY AT 12:30PM ET
Lunch & Learn: Clinical Docs with Teavy



EVERY WEEKDAY AT 11AM ET
Daily Onboarding Office Hours



Teach Me Tuesdays
LIVE TRAININGS

LIVE TRAINING MAY 19, 2026 AT 2:00 PM ET
Teach Me Tuesdays: Admin Setup



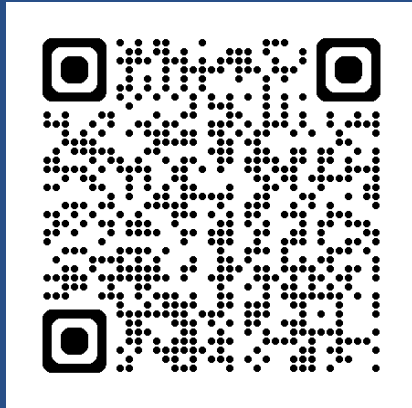
LIVE TRAINING MAY 20, 2026 AT 1:00 PM ET
Visit Maintenance: No Schedule Opening



Teach Me Tuesdays
LIVE TRAININGS

LIVE TRAINING MAY 26, 2026 AT 2:00 PM ET
Teach Me Tuesdays: Scheduling

Upcoming: Caregiver Readiness
Training



[Register Here](#)

Thursday, July 23, 2026 at
11:00 AM ET

Questions?

thank you