



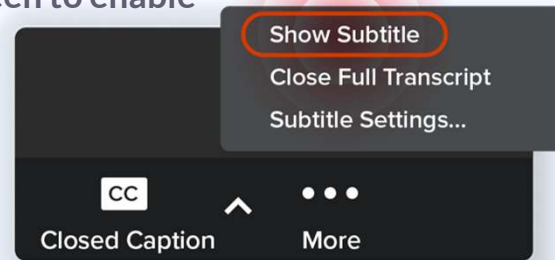
**Our Webinar Will
Begin Shortly**



Accessibility Options

Enabling Closed Caption

- This webinar is being recorded. We will email the recording and slides after the session.
- Your camera and mics are turned off.
- Q&A at the end. Please submit your questions in the Q&A box.
- This webinar is Closed Caption enabled.
- Please proceed by selecting the Closed Caption option at the bottom of your screen to enable feature.



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Michigan Foundations 2: Caregiver Readiness Training

July 23, 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.

Caregiver Readiness

Overview

What this training covers:

This session focuses on preparing caregivers for real-world success with EVV. We'll walk through how to train, support, and guide caregivers so they understand exactly how to clock in, clock out, and complete visits correctly using approved methods.

Who should take this training?

- Administrators overseeing caregiver onboarding
- Coordinators responsible for training and supporting caregivers
- Onboarding staff preparing caregivers for EVV workflows

> Poll

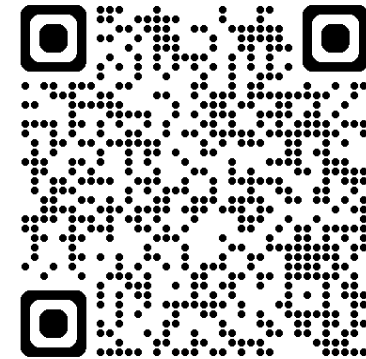
Have you completed the following?

- Created and activated all caregiver user accounts
- Ensured caregivers are linked to the correct beneficiary & services
- Confirmed contracts and EVV settings are configured correctly in the system

A. Yes

B. No

Previously: System Setup Training



[Recording](#)
from July 15, 2026

Objectives

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



Prepare

caregivers to successfully use EVV tools and workflows.



Train

caregivers on approved clock-in and clock-out methods.



Ensure

caregivers are confident using mobile app and/or Landline options.



Identify

and resolve common caregiver challenges before they impact visits.



Support

caregiver adoption to improve compliance and accuracy.

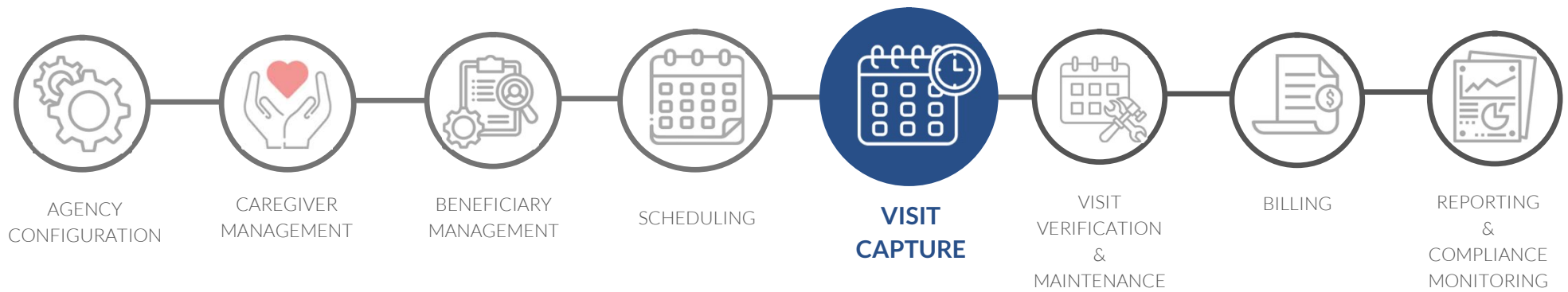
agenda

- Housekeeping
- Caregiver Roles & Responsibilities
- Mobile App Download & Registration
- Visit Capture for Employees
- Cluster Care Introduction
- Key Takeaways
- Resources
- Questions



Housekeeping

> EVV Overview



➤ 6 Elements of a Cures Compliant Visit



Who

Beneficiary



Who

Caregiver



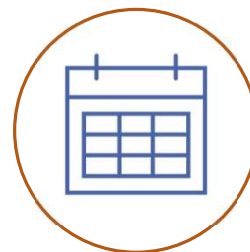
What

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.

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. Shanieka

B. George

C. Teavy

D. Janny



Caregiver Roles & Responsibilities

➤ Caregiver Roles & Responsibilities



Provide care according to the assigned schedule and service plan



Use the Mobile App or Landline (IVR) to clock in and clock out



Ensure visit details are accurate, complete, and compliant



Report issues or missed visits promptly to the agency or Employer

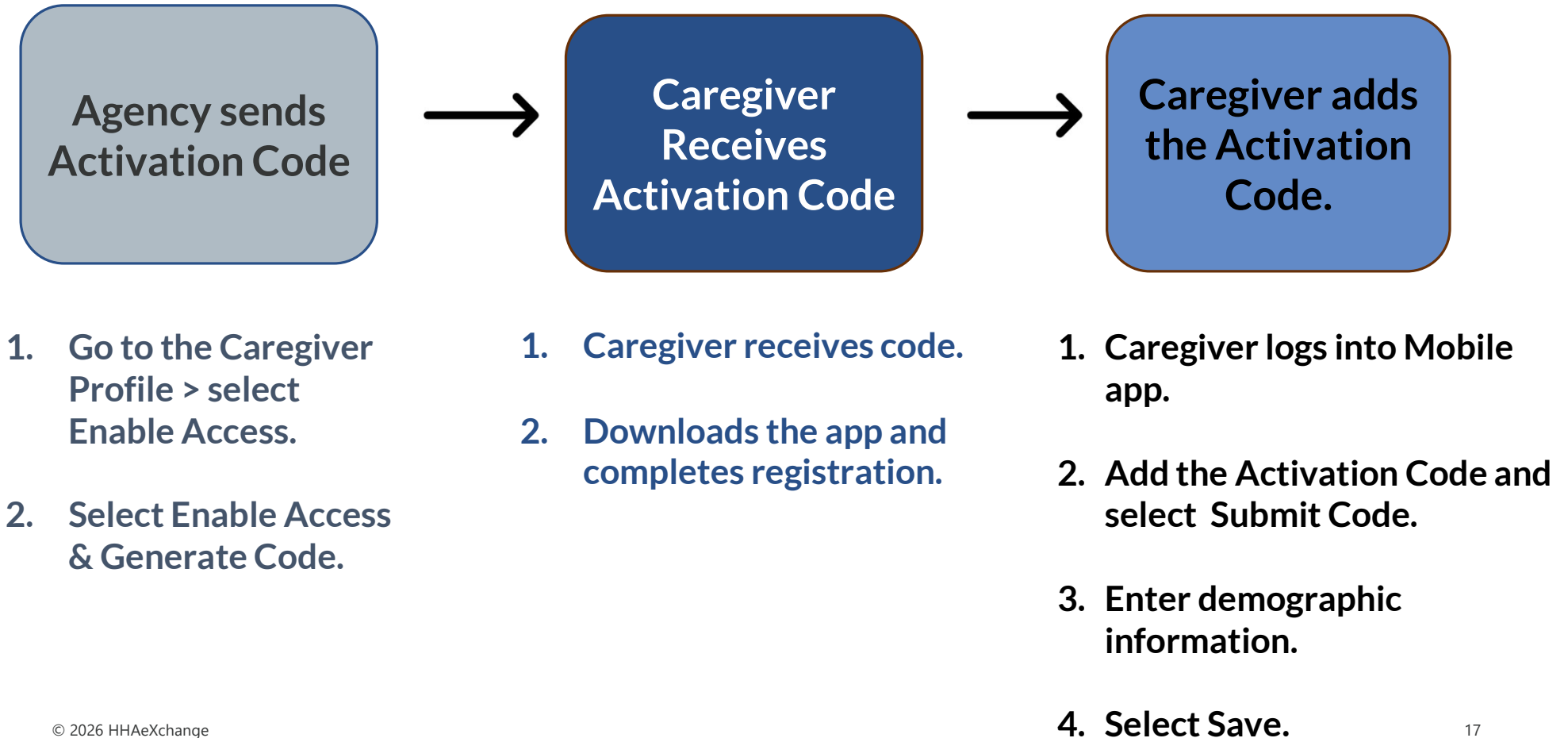


Tip: Ask during hiring whether the caregiver works for multiple agencies to avoid setup issues later.



Mobile App Download & Registration

➤ Mobile App Setup: Activation Code



➤ Mobile App Settings: Activation Code

Note: Sending out the activation code is based on notification preferences.

The screenshot displays the 'Profile' page of the HHAExchange system. The page is divided into several sections: Demographics, Contact Information, Marital Status, and Mobile App Settings. A modal window titled 'Enable Mobile App Access' is open in the center, showing options to send an activation code via email or SMS. The 'Enable Mobile App Access' button in the bottom right of the modal is highlighted with a blue circle and the number 4. The 'Send by text (SMS)' option is highlighted with a blue circle and the number 3. The 'Enable Access & Generate Code' button in the bottom right of the modal is highlighted with a blue circle and the number 4. The 'Enable Access' button in the 'Mobile App Settings' section is highlighted with a blue circle and the number 2. The 'Profile Log' button in the top right corner is highlighted with a blue circle and the number 1.

Profile Profile Log 1 Edit

Caregiver Type Employee

Demographics

Caregiver Code UMA-1066

Secondary Offices

Marital Status

Contact Information

Address CHICAGO, IL, 60629

Marital Status

Contact Information

Address CHICAGO, IL, 60629

Mobile App Settings

Mobile App Access 2 History

Enable Access

Mobile App Connection Status 3

Disconnected

Mobile Activation Code 4 History

Mobile app access must be enabled.

Enable Mobile Chat? 1

Mobile app access must be enabled.

Enable Mobile App Biometric 2-Factor Authentication 1

Mobile app access must be enabled.

Allow Caregiver to Select Community Visit 1

Mobile app access must be enabled.

Mobile/Portal ID Type 1

Mobile Device ID 1

Enable Mobile App Access

Enabling mobile application access will generate a Mobile Activation Code for this Caregiver, which will allow them to log into the HHAExchange mobile app.

Send code to Caregiver:

☒ Do not send code

☐ Send by email

☐ Send by text (SMS)

Caregiver does not have email address configured.

Cancel Enable Access & Generate Code 4

Allen Don Active

Home Phone

Address
CHICAGO, IL 60629

Languages

Date of Birth
1987-01-29Caregiver Code
UMA-1066Availability Updated
4/5/2024Provider (Office)
UMA Healthcare (PE Training Use Only)
(UMA MI office)Team
SelectCaregiver Hours
H 0 | V 0

- Profile
- Compliance
- Calendar
- Visits
- In Service
- Rates
- Notes
- Preferences
- Absence/Restriction
- Availability
- Payroll Info
- Pay Check
- Patient History
- Others
- Document Management

Profile

Profile Log

Edit

Caregiver Type *
Employee

Demographics

First Name
DonInitials
DAAlt.Caregiver Code
--Rehire
NoRehire Date
--Dependents
--Middle Name
--Gender
MaleTime & Att. PIN
100066Ethnicity
--Upload Picture
--Last Name
AllenDate of Birth *
01/29/1987Social Security Number *
675-54-7865Country of Birth
--Caregiver Code *
UMA-1066

Secondary Offices

Marital Status
--

Contact Information

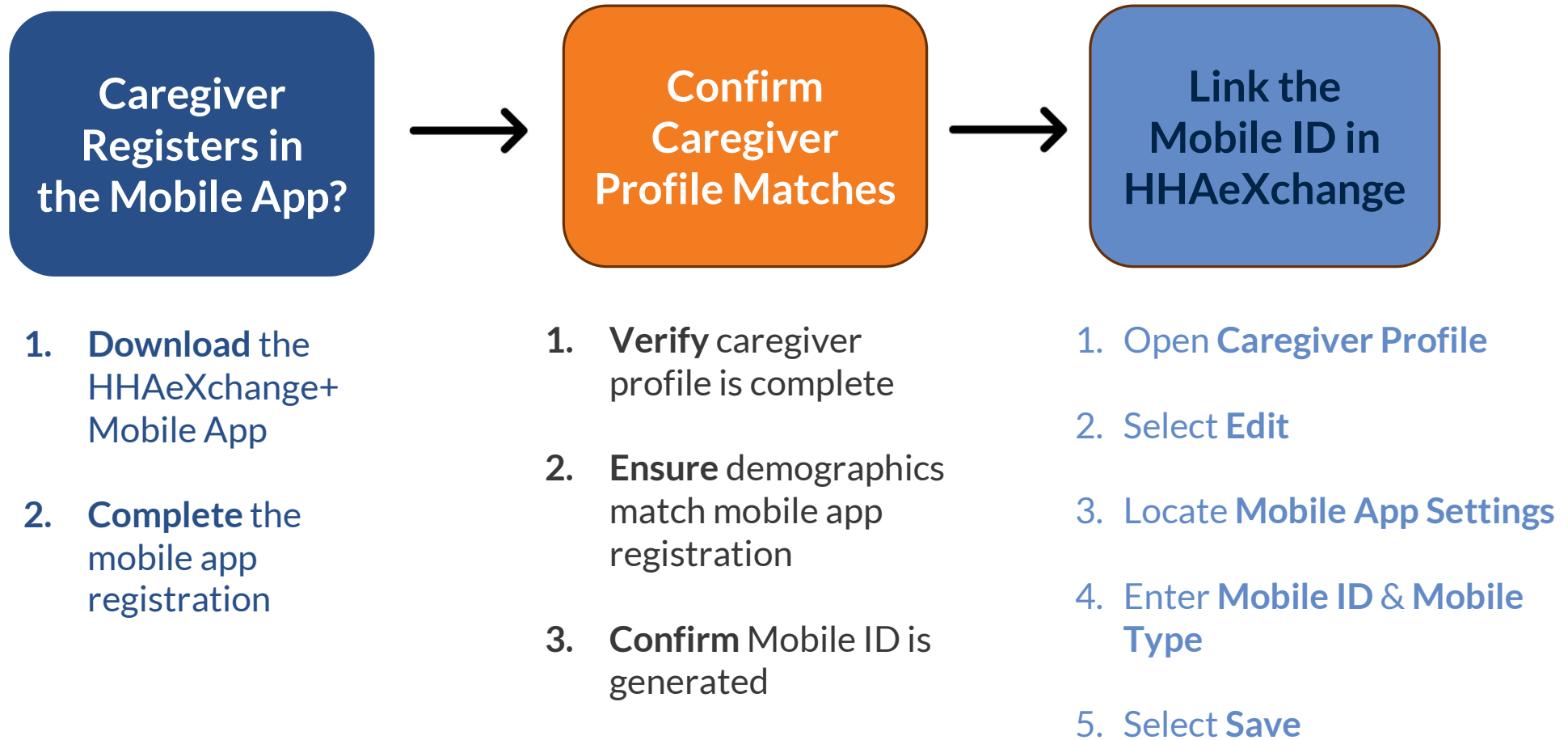
Address
CHICAGO, IL, 60629Primary Phone
--Secondary Phone
--Tertiary Phone
--

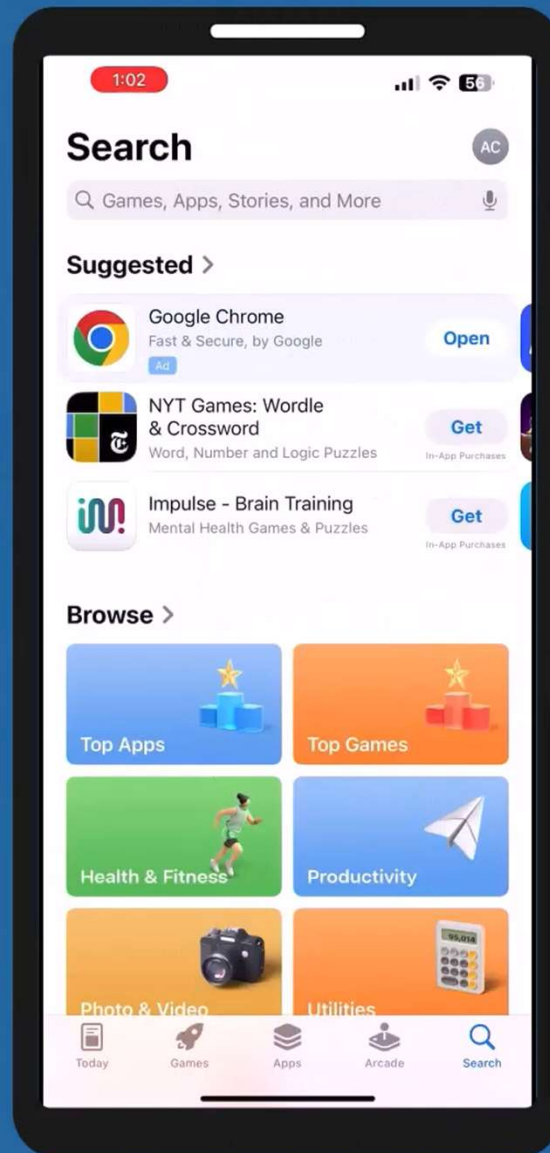
History

History

Chat

➤ Mobile App Setup: Download & Registration





➤ Caregiver Readiness



Getting Started: Caregiver Readiness Checklist

Use this checklist to give caregivers the tools to confidently perform EVV.



1. Complete Caregiver Mobile App Registration & Setup

Purpose: Ensures the caregiver is registered and linked to your agency using a Mobile ID so EVV visits are captured correctly.

Ensure Caregivers have:

- ☐ Downloaded the HHAexchange Mobile App, registered and logged in
- ☐ Provided you (Agency) with their Mobile ID after registration

Agencies:

Caregiver Readiness Checklist



HHAexchange+ Mobile: A Step-By-Step Guide for Caregivers

Use this guide to get started with the HHAexchange+ app, from first login through clocking out. Each step is simple, visual, and made to keep your day running smoothly!

Getting Started: Download, Sign Up, and Register

1



Download HHAexchange+ app.

2



Open the app and select your Language preference and tap Apply.

3



Tap Sign Up Here.

4



Enter your email address, create and confirm password, then tap Sign up to create your account.

HHAexchange+ Caregiver User Guide

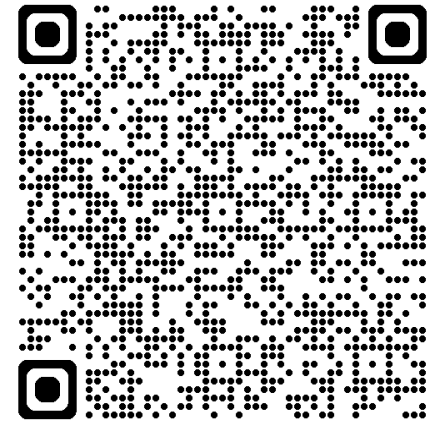
➤ Managing Mobile App Users

Navigate to **Admin > Mobile User Management**

Mobile User Management (+)

Provides a centralized place to manage service providers using **HHAeXchange+**.

- Search for mobile app users
- View caregiver app status
- Verify app version
- Update caregiver email
- Reset passwords



[Mobile User Management](#)

➤ Mobile User Management (+)

Mobile User Management (+)

Management Search

Office Name	Last 4 SSN	Caregiver Email ID	First Name
Last Name	App Version		
	All		

Search Results (32)

Office Name	Caregiver Name	Date Of Birth	Phone Number	Last 4 SSN	Email Address	Status	App Version	Edit	Password
UMA healthcare		06/15/1992		3333		Active	UMA	✎	Reset
UMA healthcare		01/11/1988		4242		Active	UMA	✎	Reset
UMA healthcare		02/26/1990		1234		Active	UMA	✎	Reset
UMA healthcare		01/01/1990		5452		Active	UMA	✎	Reset
UMA healthcare		10/06/1998		1234		Active	UMA	✎	Reset
UMA healthcare		01/01/1950		4124		Active	UMA	✎	Reset
UMA healthcare		09/01/1970		9876		Active	UMA	✎	Reset
UMA healthcare		08/12/1984		3321		Active	UMA	✎	Reset
UMA healthcare		04/01/2000		3223		Active	UMA	✎	Reset
UMA healthcare		06/01/1980		1234		Active	UMA	✎	Reset
UMA healthcare		01/01/1990		1994		Active	UMA	✎	Reset

Knowledge Check 1 – Mobile App

What is the correct first step for a caregiver to begin using the HHAeXchange+ mobile app?

- A. Start providing visits without logging into the app
- B. Download the approved mobile app and complete registration using the provided credentials
- C. Wait for the first scheduled visit to activate the app
- D. Register using any personal email without agency approval



Visit Capture for Employees

➤ Visit Capture Methods for Employees



Mobile App

Preferred EVV Method

- ✓ Smartphone-based
- ✓ GPS verified
- ✓ Offline capable

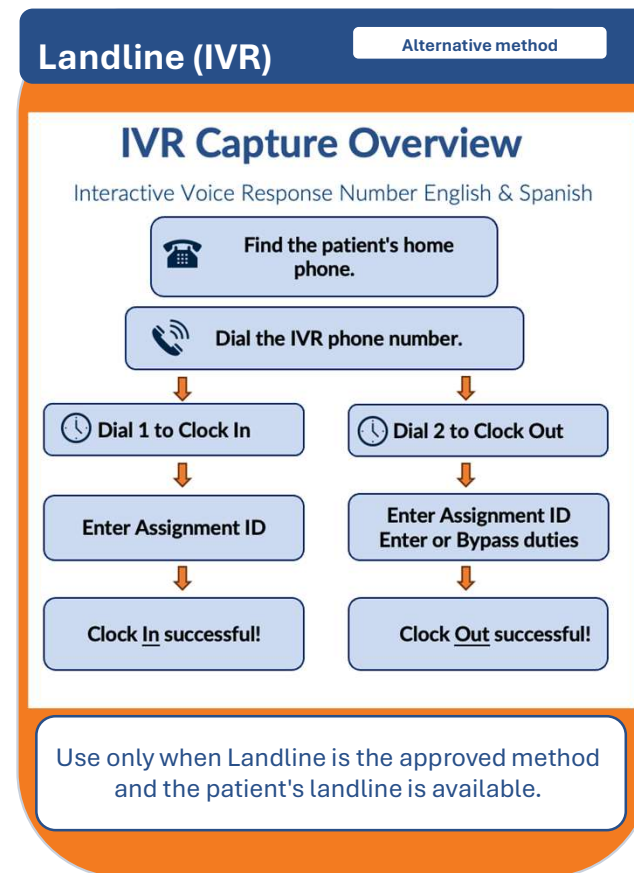
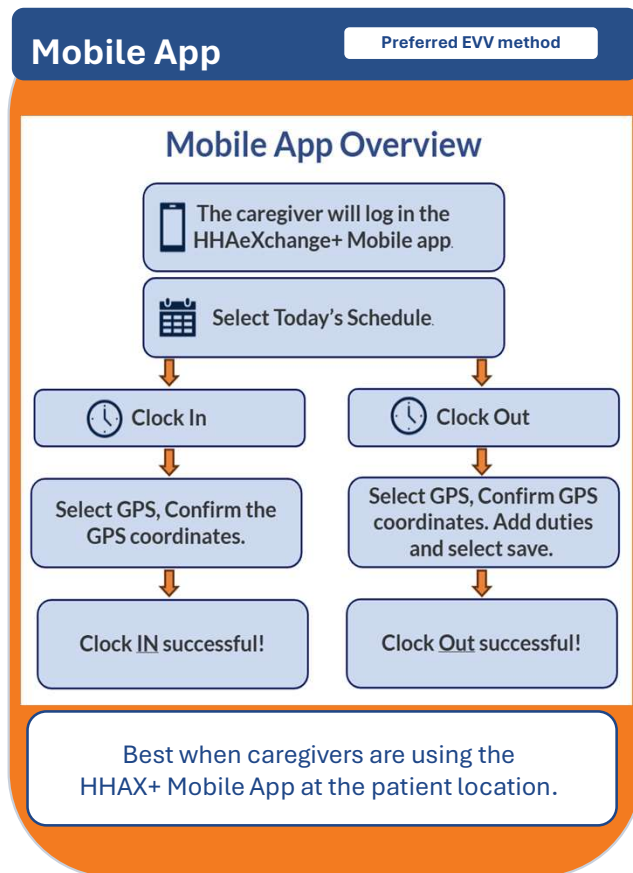


Landline

Alternative EVV Method

- ✓ Uses Beneficiary's home phone number
- ✓ Voice-based clock in/out

Visit Capture Process by Method

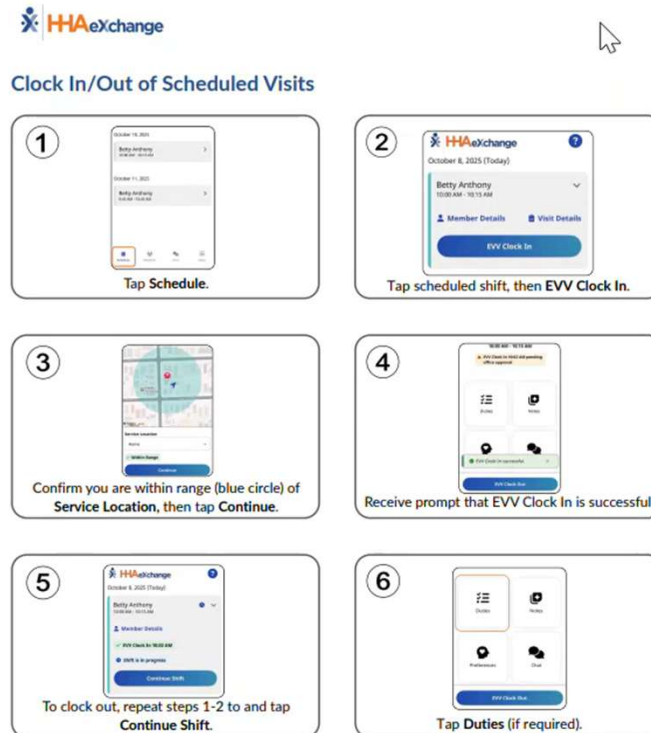


➤ Visit Capture: HHAeXchange+ Mobile App

Scenario:

The caregiver arrives at the Beneficiary'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.

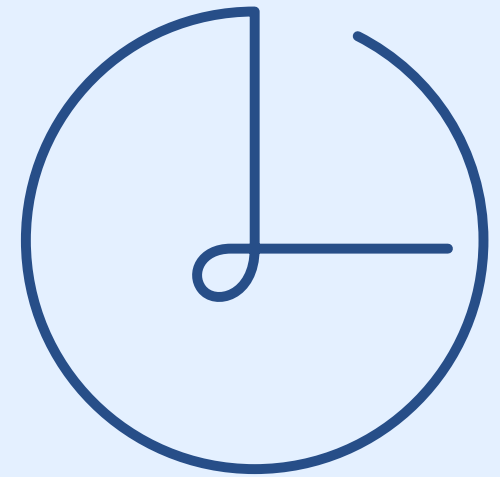
[HHAeXchange+ Caregiver User Guide](#)



> Poll

Which shifts are your agencies using?

- Scheduled
- Unscheduled
- Both





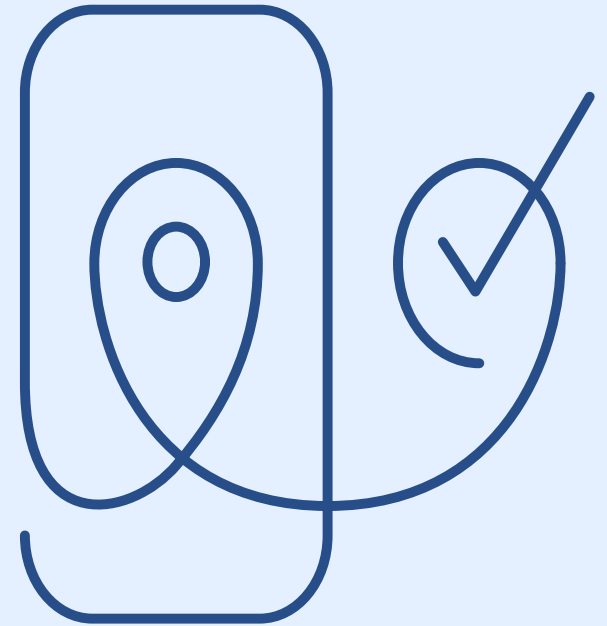
How to Clock In and Out for a Scheduled Visit in the HHAeXchange+ Mobile App

This video uses the Standard System Terminology

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

> Poll

How many of you are familiar with Offline Mode?



Offline Mode Overview

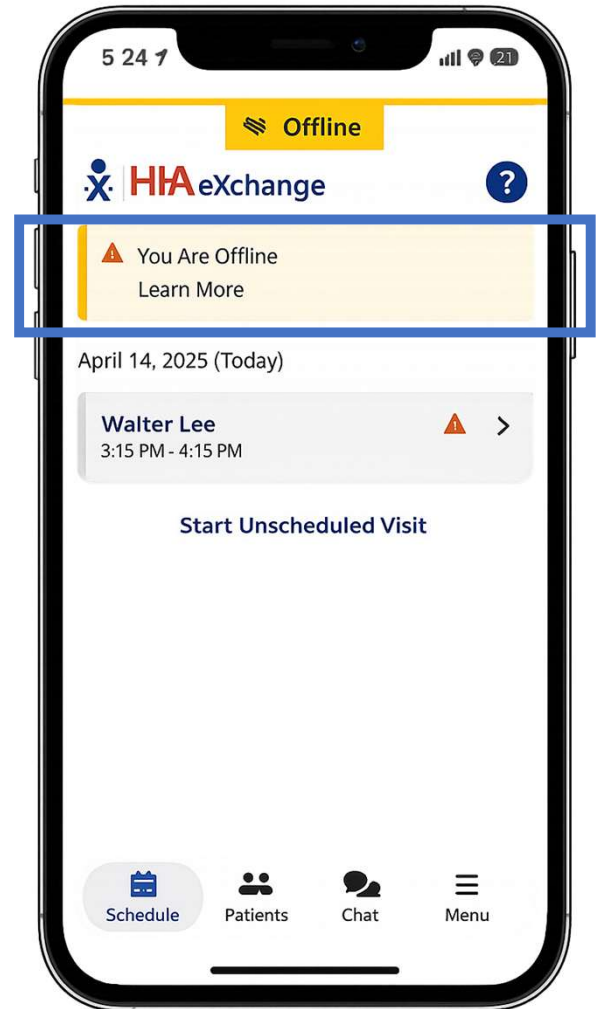
What is it?

- Offline Mode allows caregivers to capture EVV using the Mobile App when there is no to low internet or cell service.
- **Automatically** activates when the device has no signal or internet
- EVV data syncs automatically once connectivity is **restored**

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!

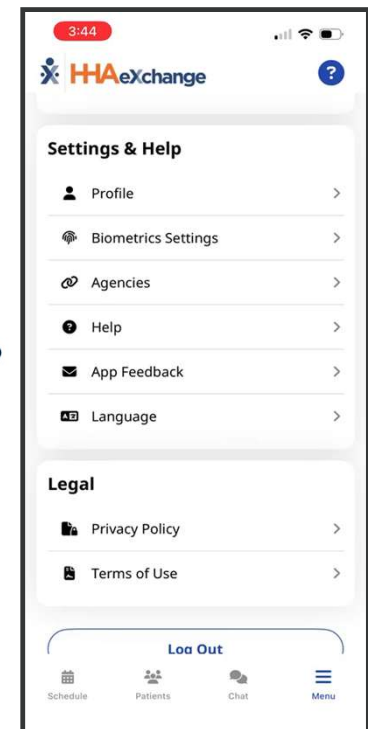
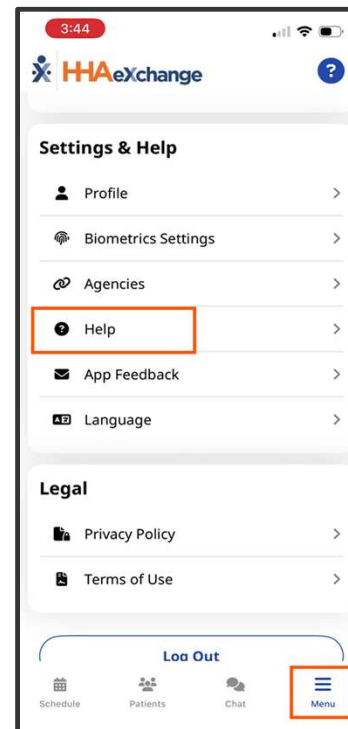


➤ Troubleshooting – Mobile App Help

The Help feature offers in-app support for caregivers in the field.

Mobile App Help Access

1. **Open** the HHAX+ Mobile App and log in.
2. Navigate to the **Help** section.
3. Review the available troubleshooting guidance.
4. Follow the recommended steps to access necessary support resources.



➤ Visit Capture: Landline

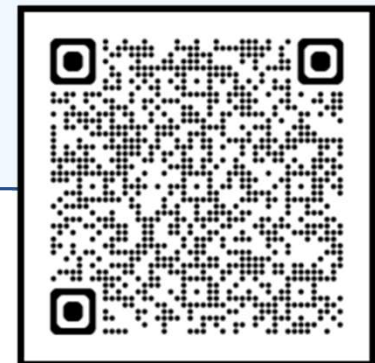
Before calling, the Caregiver must have:

- 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.

NOTE: Toll-free (IVR) number found in HHAeXchange portal under **Admin > Agency Profile > then General** section.



Visit Capture Best Practices

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

Compliant 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-Compliant 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

Knowledge Check 2 – EVV

What must a caregiver do to ensure an EVV visit is recorded correctly?

- A. Check in at the start of the visit and check out at the end using the approved EVV method at the patient's location
- B. Only check in if the visit is longer than one hour
- C. Submit visit details at the end of the week
- D. Ask the member to confirm the visit verbally



Cluster Care Introduction

> Poll

**Who's currently using
the Cluster Care
feature?**



➤ Cluster Care

What is Cluster Care?

- Cluster care supports EVV for **three or more patients** receiving services at the same time and location.
- Patients must have the same **address and phone number** in their profiles before they can be added to the cluster.

Note: Cluster visits require a mutual service code; all cluster visits must use the same time and assigned caregiver.

Cluster Care

How to Set Up Cluster Care:

1. Open each patient's profile.
2. Verify that all patients have the same address and phone number.
3. Go to the **General** tab.
4. Click **Edit**.
5. In the **Service Type** section, select "**Cluster**".
6. Enter the names of all patients in the cluster.
7. Click **Save**.
8. Confirm the **Cluster section** appears under the patient's profile.

Cluster Care

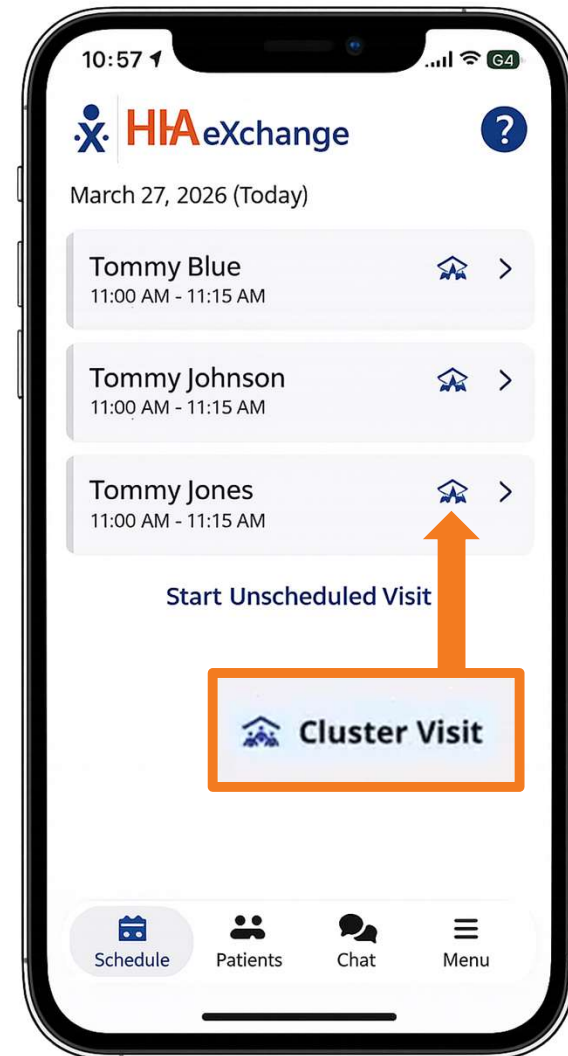
How to Schedule a Cluster Visit:

1. Ensure all patients:
 - Have the same schedule
 - Use a **mutual service code**
 - Are assigned the same caregiver
2. Go to the **Patient Calendar**.
3. Select a date and click **New Non-Skilled Visit**.
4. Enter required details:
 - Scheduled time, Caregiver, Pay code, Primary bill-to, & Service code
5. Click **Save**.
6. Confirm the “**C**” icon appears on the visit.
7. **Repeat** these steps for each patient in the cluster.

➤ Upcoming Feature: Clusters

Clusters

- Complete EVV for multiple patients in one streamlined workflow.
- Fewer repetitive steps means faster action in the field.
- Updated UI makes cluster visits simpler, quicker, and easier to manage.



Blue TommyActive

Home Phone
786-229-0063

Address
1367 sw 3rd st, MIAMI, FL 33135

Languages
--

Date of Birth
01/01/1955

Contract
Life Care Demo Payer (KHC)

Patient [Alt ID]
-- [95456545566]

Coordinators
Default

Admission ID
KHC-900125

Office
UMA healthcare

- Patient Search
- General

Contracts/Insurance

Profile

Eligibility Check

Auth/Orders

Special Requests

Master Week

Calendar

Visits

POC/PCP

Caregiver History

Others

Rates

Financial

Vacation

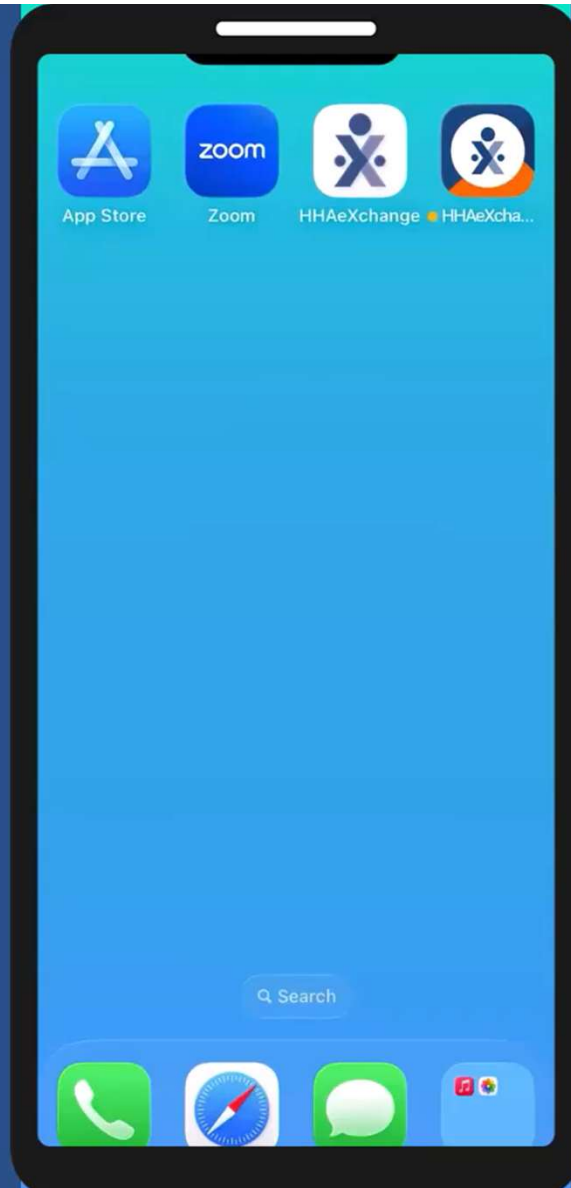
Family Portal

Doc Management

General

HistoryUpdate Patient StatusEdit

Nurse	Coordinator	Coordinator 2	Coordinator 3
--	Default	--	--
Caregivers with Mobile Patient Info AccessFreeman, Jane (UMA-1008)			
EVV Required		Service Request Start Date	Projected Discharge Date
Yes		07/01/2024	--
Disable automatic visit creation based on EVV confirmation		Service Type	
No		--	
Enable Alternative Device Confirmation		Patient Profile Header Alert	Source of Admission
No		--	--
Expanded Time for Auto-Verification			
No			
Automatic Downward Adjustment			
No			
Patient is not Consumer Directed Services (CDS) Employer			
Timesheet Required	Location	Team	Branch
--	--	--	--
Alerts			
--			



Knowledge Check 3 – Cluster Care

What does tapping EVV Clock In once during a cluster visit do?

- A. Starts the visit for only the selected patient
- B. Creates separate time entries for each patient
- C. Pauses scheduled visits until documentation is completed
- D. Automatically clocks in all patients in the cluster

> KEY TAKEAWAYS



➤ Key Takeaways

Caregiver Training

Know how to train caregivers on EVV expectations and tools.



Reduce Missed Visits

Reduce missed or incomplete visits through proactive training.



Approved Methods

Understand approved clock-in/out methods (mobile, IVR, etc.).



Build Confidence

Build caregiver confidence and adoption.



Real-World Support

Support caregivers through real-world scenarios.



Cluster Visits

Understand how to clock-in/out of Cluster visits.



RESOURCES



Support Resources

Training Videos:

- [EVV Overview](#)
- [How to Enable Mobile App Access](#)
- [How to Clock In and Clock Out of the HHAeXchange+ Mobile App](#)
- [How to Locate Time & Attendance PIN](#)
- [How to Save the IVR Phone #](#)
- [How to Clock In and Out via IVR](#)
- [HHAeXchange+ Caregiver User Guide](#)
- [How to Setup a Cluster and Schedule a Cluster Visit](#)
- [How to Clock In and Out for a Cluster Scheduled Visit in the HHAeXchange+ Mobile App](#)
- [How to Create an Individual Visit](#)
- [How to Create a Master Week](#)

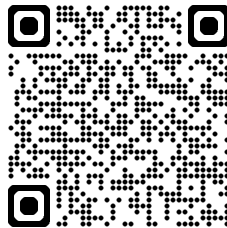
Knowledge Base:

- [Caregiver Knowledge Base](#)
- [Caregiver Readiness Checklist](#)
- [Mobile User 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, and for MI CHOICE, MI HEALTH LINK, MEDICAID MANAGED CARE PLAN (MHP) AND BEHAVIORAL HEALTH as of July 1, 2024.

➤ Provider Resources: HHAeXchange Knowledge Bases



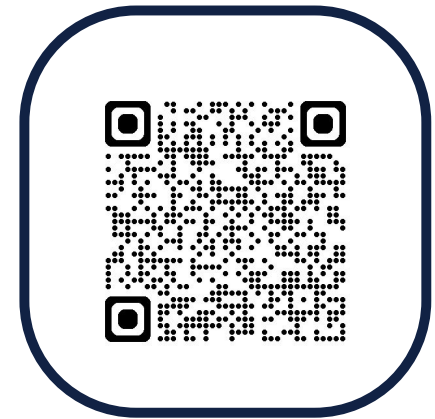
Provider Knowledge Base

<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](tel:1-800-979-4662) call:
1-800-979-4662
- [Typical providers](tel:1-800-292-2550) call:
1-800-292-2550
- [Beneficiary Help Line](tel:1-800-642-3195):
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



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



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

Upcoming: Visit Maintenance &
EVV Compliance Reporting
Training



[Registration](#)

Wednesday, July 29, 2026
at 11:00 AM ET

Questions?

thank you