



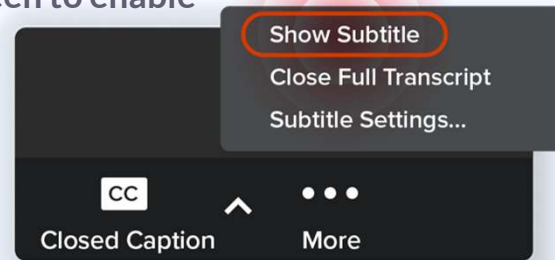
**Our Webinar Will
Begin Shortly**



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.
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Michigan Foundations 3: Visit Maintenance & EVV Compliance Reporting Training

July 29, 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 will be a First Time Mom this year!



Visit Maintenance & EVV Compliance Reporting

Overview

What this training covers:

This training is designed to help your team move from reactive to proactive EVV management. We'll focus on how to review visits, resolve exceptions, and use reporting tools to monitor compliance and improve overall performance.

Who should take this training?

- Administrators overseeing compliance and operations
- Coordinators managing visit workflows and issue resolution
- Schedulers responsible for ensuring visit accuracy and follow-up

> Poll

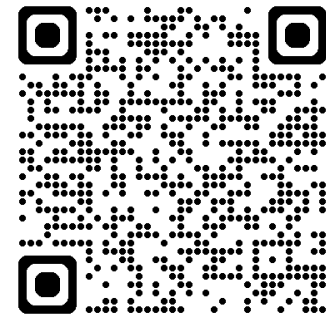
Have your caregivers completed the following?

- Understand their roles and responsibilities
- Clocked in and out using approved EVV methods
- Completed or practiced EVV visits

A. Yes

B. No

Previously: Caregiver Readiness Training



[Recording](#)
from July 23, 2026

Objectives

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



Monitor

EVV visits for accuracy and compliance.



Identify

and resolve visit exceptions and errors.



Perform

visit maintenance actions (review, adjust, approve).



Utilize

EVV compliance reports to track performance.



Proactively

manage compliance and reduce risk.

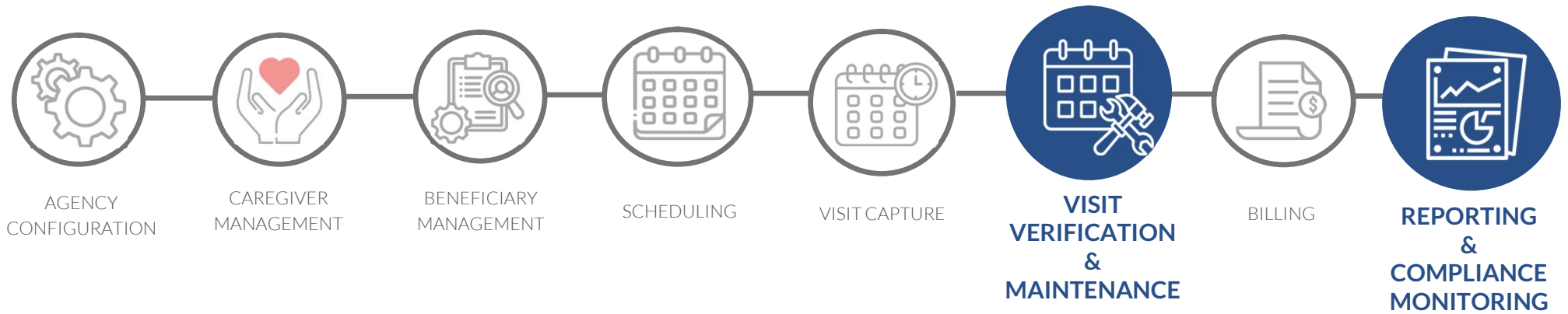
agenda

- Housekeeping
- Cluster Care Refresher
- Visit Maintenance Overview
- Managing Visit Exceptions
- Reporting & Monitoring EVV
- Key Takeaways
- Resources
- Questions



Housekeeping

> EVV Overview



➤ 6 Elements of a Cures Compliant Visit



Who

Beneficiary



Who

Caregiver



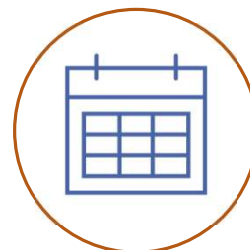
What

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.

➤ Roles & Responsibilities



Agency/Provider Administrators

- Set up users, access, contracts, and services.
- Monitor EVV activity and compliance readiness.



Employers/Coordinators

- Schedule visits and manage visit workflows
- Review exceptions and follow up when visits need attention



Caregivers/Service Providers

- Deliver authorized services
- Clock in and out using approved EVV methods



Beneficiaries/Representatives

- Confirm services were received, when applicable
- Communicate visit concerns or support needs promptly



Note: Clear role ownership helps prevent missed visits, unresolved exceptions, and compliance gaps.

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. Teavy

B. Ashley

C. George

D. Shanika



Cluster Care Refresher

➤ 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.
- Once saved, a **Cluster** section appears on the patient profile to show everyone included.

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.

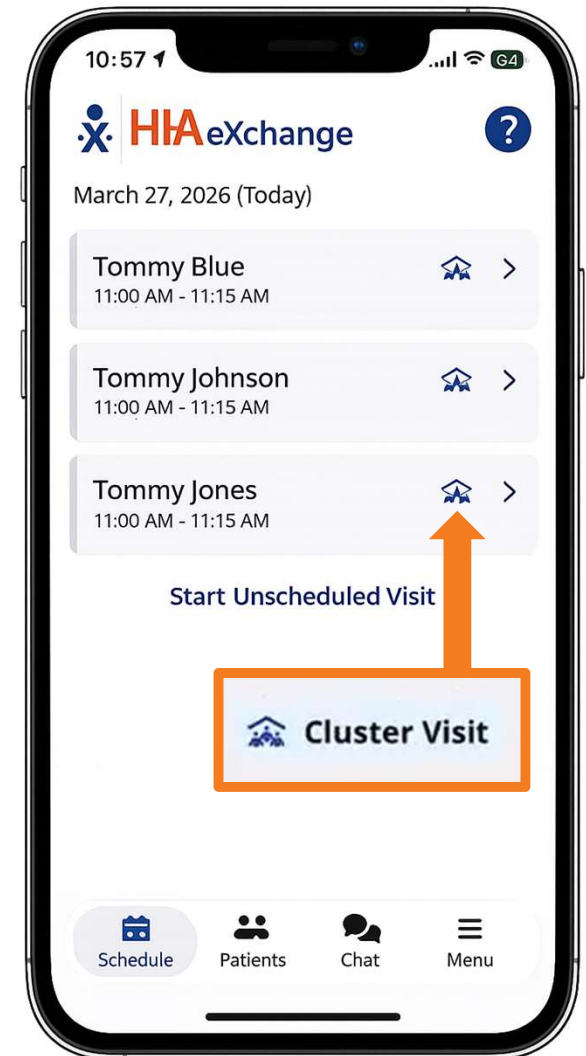
➤ Upcoming Feature: Clusters

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.

[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](#)





Visit Maintenance Overview

> Poll

**How many of you
are still using the
Call Dashboard?**



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: Linking EVV

Steps:

1. Hover over the **Suggested EVV** confirmation.
2. Select **Link/Edit**.
3. **Link or Reject** suggested EVV.
4. Select **Save**.

The screenshots show the 'Visit Maintenance' interface. The top screenshot displays a visit for 'Johnson, Barbara [KHC-1114]' with a 'Suggested EVV Clock-In' at 01/13/2026 10:21 AM and a 'Suggested EVV Clock-Out' at 01/13/2026 01:45 PM. A 'Link/Edit' button is highlighted in the 'Suggested EVV Clock-Ins' section. The bottom screenshot shows the same visit after the EVV has been linked, with the 'Link/Edit' button now disabled.



Note: Linking EVV ensures the visit is validated and exception-free.

➤ Visit Verification: Scheduled vs Unscheduled Visits Workflows

Scheduled Visits

1. Access Visit Maintenance

- Navigate to the **Visit** menu.
- Select **Visit Maintenance**.
- Choose the **Visits** tab.

2. Apply Search Criteria

- Select **Office, Date Range, Visit Status, & Visit Exceptions**.
- (Optionally, filter by specific Member and Caregiver.)

3. Review & Address Visits

- Confirm visit information and clock in & clock out activity.
- Address any visits that require follow-up.

Unscheduled Visits

1. Access Visit Maintenance

- Navigate to the **Visit** menu.
- Select **Visit Maintenance**.
- Choose the **Unscheduled Services** tab.

2. Apply Search Criteria

- Select **Office, Date Range, Visit Status, & Auto-Create Exceptions**.
- (Optionally, filter by specific Member and Caregiver.)

3. Review Settings

- Review unscheduled visit details.
- Identify Auto-Create exceptions. Address visits that require follow-up or correction.



Key Difference: Scheduled visits are selected from an existing schedule, while unscheduled visits are created in the mobile app before EVV begins.

Hello PEdemoAC

Placements (9 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 1 – Visit Maintenance

What is the primary goal of visit maintenance in EVV compliance monitoring?

- A. To modify visits so they match caregiver preferences
- B. To ensure visits are accurate, complete, and compliant with EVV and payer requirements
- C. To eliminate the need for caregiver corrections
- D. To approve all visits regardless of missing data



Managing Visit Exceptions

➤ Visit Maintenance Scenarios

These are the most common EVV exceptions scenarios for Visit Maintenance.



**No Schedule
Opening**

Scheduled visit
exists but no
opening matches
the EVV.



**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**

EVV location
does not match
the service
location.

➤ 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 PEdemoAC

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

Placements

Pending (0) Accepted with Temp Caregiver (9) Staffed (0) Accepted with No Master Week(0)

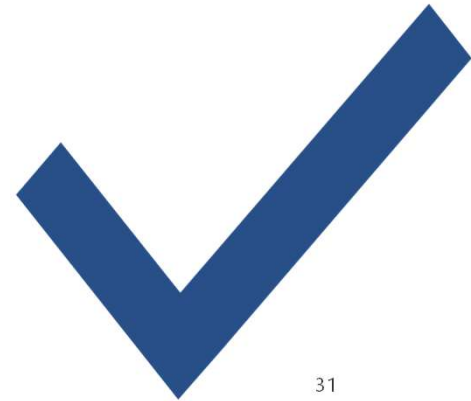
Patient ^	Admission ID ^	Office ^	Start Date ^	Stop Date ^	Frequency ^	Service Category ^	Service Type ^	Request Sent At ^	Status ^	Cut Off Time ^	Payer Name ^
-----------	----------------	----------	--------------	-------------	-------------	--------------------	----------------	-------------------	----------	----------------	--------------

No data available in table

➤ General Prevention

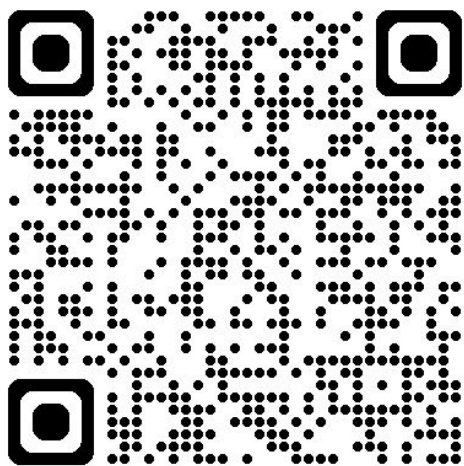
How Do I Reduce Issues?

- ✓ Schedule visits before care starts.
- ✓ Confirm caregiver setup before first visit.
 - Ensure caregivers are ready to use Mobile App/Beneficiary Home Landline (IVR).
 - Wait a few seconds before mobile EVV clock-in/out to confirm location range.
 - Make sure caregivers are performing EVV on time and in range.
- ✓ Use Visit Maintenance before manual edits.
- ✓ Link valid EVV instead of recreating visits.
- ✓ Review exceptions daily before billing.
- ✓ Use reports to identify repeat root causes.





Visit Maintenance Resource



Knowledge Check 2 – Visit Exceptions

Which situation would typically result in an EVV exception that requires review or correction?

- A. A visit that was completed exactly as scheduled
- B. A caregiver forgets to clock in or clock out of a visit**
- C. A visit that matches the authorization perfectly
- D. A visit that is approved before billing



Reporting & Monitoring EVV

➤ EVV Compliance Reports

The EVV Compliance Reports provide a quick look at your EVV Compliance rates.

Path:

Go to Report > **EVV Compliance Reports**
> Select the preferred EVV Compliance Report.



[EVV Compliance System Reports](#)

EVV Compliance Summary Report

What is it?

- This report shows the **compliance percentage for each contract** during a selected time period, including key visit and exception metrics that impact EVV compliance.

Why is it useful?

- It gives agencies a high-level view of compliance performance by contract, making it easier to spot trends, address issues early, and improve compliance outcomes.

When is it used

- To review contract-level EVV compliance regularly
- To identify patterns in exceptions or missed visits
- To support follow-up and process improvements
- To stay ahead of compliance issues before they impact operations

> 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

What is it?

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

Why is it useful?

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

When is it used

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

> EVV Compliance by Caregiver Report

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

EVV Compliance By Caregiver (New)

Page 1 of 22

Report Date: 01/06/2025 10:21

Office(s):

Caregiver: All

Discipline(s): All

Caregiver Location(s): All

Include Type: All

From Date: 12/28/2024

Type of Service: Non-Skilled

Service Code(s): All

Caregiver Team(s): All

To Date: 1/3/2025

Coordinator: All

Contract(s): All

Caregiver Branch(es): 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**.

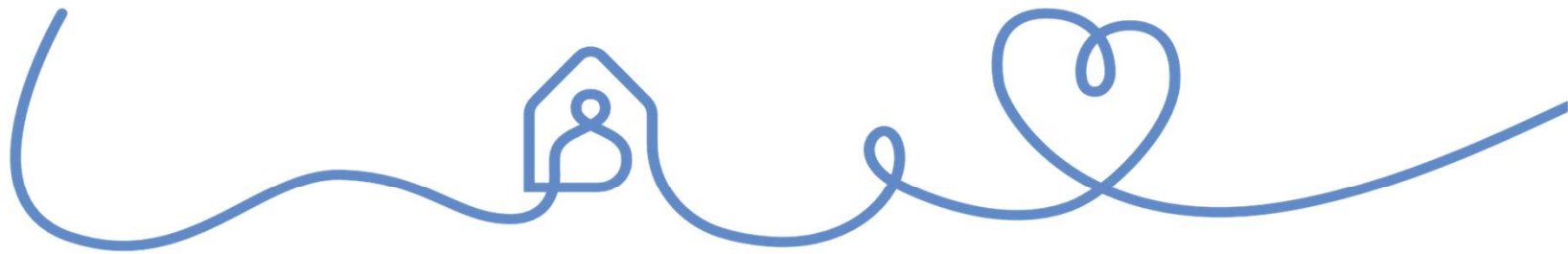
Report Name	Function
EVV Compliance Daily Summary Report	Daily compliance percentage per contract
EVV Compliance Detail Report	Compliance exception and reasons per day, per patient
EVV Compliance Exception Reason Usage Report	Compliance exception reasons and corresponding percentages per contract

➤ Knowledge Check 3 – Compliance Monitoring

Why is regular EVV compliance monitoring important for agencies?

- A. It replaces internal quality assurance processes
- B. It allows agencies to delay visit review until billing
- C. It helps identify trends, reduce compliance risk, and support accurate claims submission
- D. It ensures caregivers never need additional training

KEY TAKEAWAYS



➤ Key Takeaways

Review & Maintain Visits

Understand how to review and maintain EVV visits in Visit Maintenance.



Resolve Exceptions

Confidently resolve exceptions and errors.



Monitor with Reports

Use reports to monitor compliance trends.



Improve Efficiency

Improve operational efficiency through proactive oversight.



Strengthen Compliance

Strengthen overall EVV compliance.



RESOURCES



Support Resources

Training Videos:

- [EVV Overview](#)
- [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](#)
- [Visit Videos](#)
- [Visit Exception Guide](#)

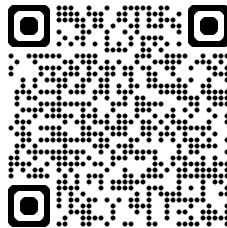
Knowledge Base:

- [Visit Verification & Visit Maintenance Checklist](#)
- [Visit Maintenance](#)
- [EVV Compliance System Reports](#)
- [Events Reports Definitions](#)
- [Reports](#)

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



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

Questions?

thank you