



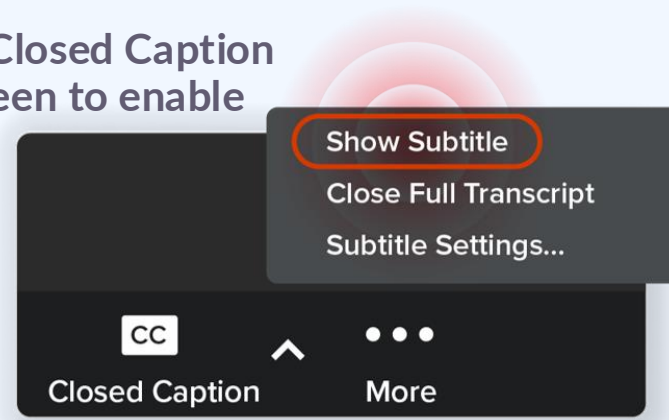
**Our Webinar Will
Begin Shortly**



Accessibility Options

Enabling Closed Caption

- This webinar is being recorded. We will email the recording and slides after the session.
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- Q&A at the end. Please submit your questions in the Q&A box.
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MS Conversations (Providers)

June 24th, 2026



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speakers



Meet Janny Sachani

- **Role:** Sr. Training Specialist
- **Tenure at HHAeXchange:** 6 years
- **Areas of Expertise:** Sponsored Training
- **Fun Fact:** I love Cheesecakes!

Overview

This session highlights key HHAeXchange updates across the HHAeXchange+ Mobile App, Conversations & more. Learn how these enhancements support better communication, stronger compliance, improved caregiver engagement, and more efficient payment reconciliation.



Who should take this training?

Home care agency coordinators, administrators, supervisors, & EVV oversight and operational staff.

agenda

- Housekeeping
- HHAeXchange+ Mobile App
- Conversations
- Caregivers Mobile Messaging
- Key Takeaways
- Resources & Q/A



Housekeeping

➤ Upcoming Features

HHAeXchange+ Mobile App

Better EVV for
caregivers and
agencies

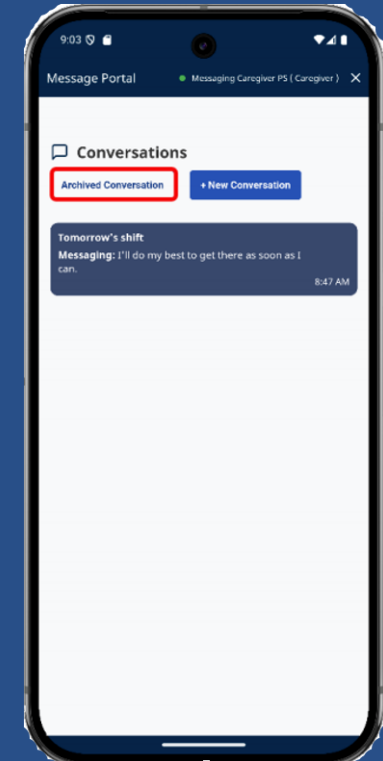
**Release Date:
July 6th**



Conversations

Secure
communication
across provider/
caregiver/
member
workflows

Coming Soon!



➤ Caregiver Compliance

MS providers can proactively monitor caregiver eligibility and reduce compliance risk.

❑ Compliance Tracking Features

- Credential & Certification Tracking
- Background & Exclusion Screening
- Provider-Specific Requirements
- Audit Readiness

❑ Benefits

- Reduce compliance risk
- Improve caregiver readiness
- Simplify audits

The screenshot displays the HHAexchange web application interface for caregiver compliance tracking. The top navigation bar includes links for Home, Member, Caregiver, Visit, Action, Billing, Report, Data Insights, and Admin. The main header shows the caregiver's name (A. R.), status (Active), and various details like Date of Birth (XX/XX/XXXX), Caregiver Code, Availability Updated (12/6/2023), Home Phone, Address (XX.XXX), Languages, Provider (Office), Team, and Caregiver Hours (S: 00:00 C: 00:00). A sidebar on the left contains links for Profile, Calendar, Visits, Notes, Availability, Others, and Office Move. The main content area is titled 'Custom Fields' and contains several sections: 'Background Check (MM/DD/YYYY) History' with a date field (01/01/2024), 'OIG Exclusion Check (MM/DD/YYYY) History' with a date field (01/01/2025), 'Nurse Aide Registry Check (MM/DD/YYYY) History' with a date field (01/01/2025), and 'Training Completed (MM/DD/YYYY) History' with a date field (01/01/2025). Below these is a 'Caregiver Type History' dropdown menu set to 'CNA'. A section with checkboxes lists various certifications: State Issued ID History, LPN Certification History, CPR Certification History, CNA Certification History, First Aid History, Certified by Case Manager History, RN Certification History, and Compliance Certification History. A 'Save' button is located at the bottom left of the form area.

835 Cash Posting Process

MS providers can proactively monitor ERA payments under E-Remittance.

Provider will be able to review the remittance file directly under

Billing → Cash Payment → E-remittance page .

Cash Payments

Payments & RefundsInvoicesBulk AdjustmentsE-Remittances

Search E-Remittances

Payer

All 9 of 9 Selected

Check Number

Status

All

E-Remittance File Name

Date Ranges

At least one of the date ranges must be limited to 180 days

Date Range

01/01/202506/30/2025

Check Date Range

mm/dd/yyyymm/dd/yyyy

Search

Reset

E-Remittances

File Name	Check ID	Check Number	Check Date	Received Date	Contract	# Patient	# Claims	Billed	Paid	Rejected	Adjustment	Patient Responsibility	Invalid Visit	Status	Apply Payments	PLB Info
CLMKHCZ50260725149000003.txt	3029136			03/12/2025 05:09:00	Life Care Demo Payer (KHC)	1	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Applied		--
	3029137			03/12/2025 05:09:00	Life Care Demo Payer (UMA)	1	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Applied		--
CLMKHCZ50260725149000003.txt	3029138			03/12/2025 05:09:00	Life Care Demo Payer (434)	1	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Applied		--

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Page 1 of 1

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1 - 3 of 3

50

per page

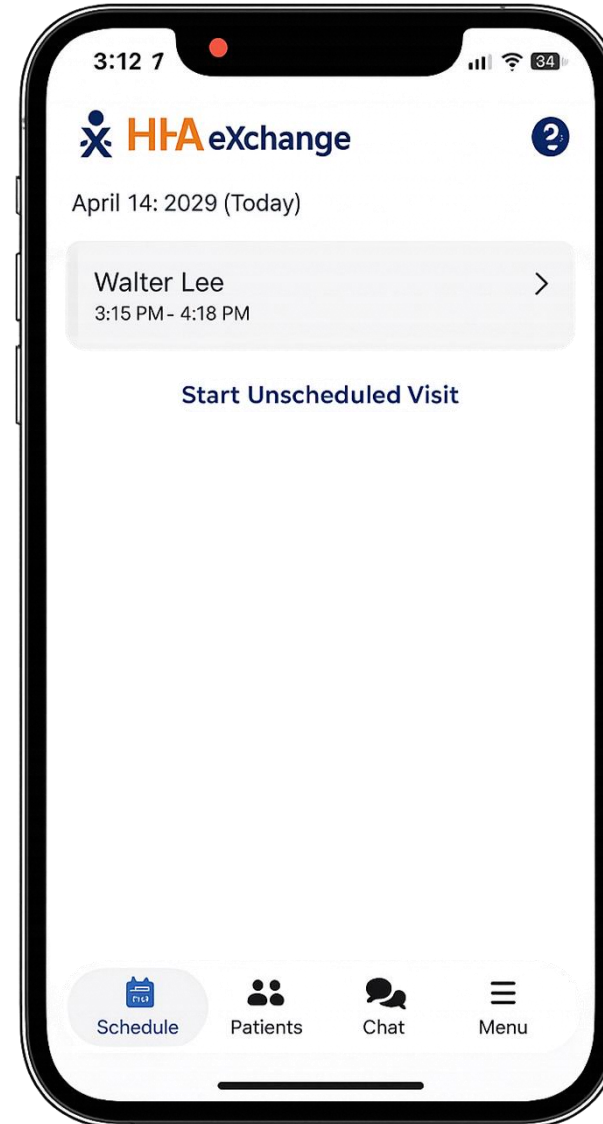
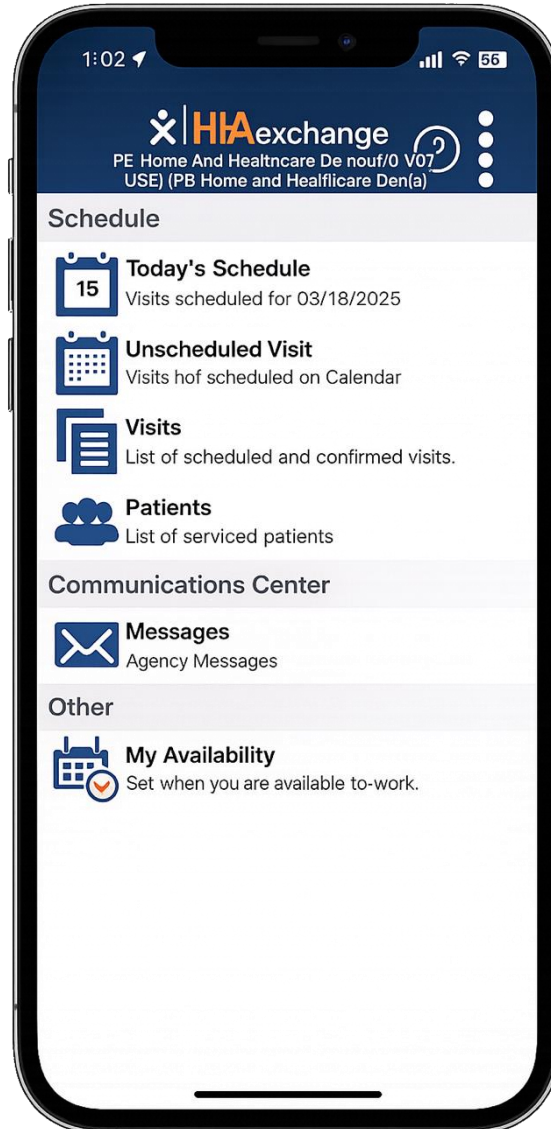
Resource: [E-Remittance](#)



HHAeXchange+
Mobile App

➤ The New HHAeXchange+ Experience

Out
with the
OLD!



In with
the
NEW!

HH AeXchange+ Mobile App Experience

Caregiver Challenges

- Clunky paperwork or confusing tech.
- Missed EVV and compliance risks.
- Language barriers.



HH AeXchange+ Benefits

- Simple intuitive interface.
- Push notifications, GPS accuracy ensure EVV compliance.
- Reliable offline mode keeps visits on track regardless of data.
- App available in 23 languages.



➤ A Day in the life with HHAeXchange+

Before HHAeXchange+

- Struggles to find their schedule
- Misses or incorrectly captures EVV
- Ends the day with incomplete or inaccurate documentation

Results: More admin follow-up, delayed billing, and caregiver frustration

With HHAeXchange+

- Logs in and immediately sees their schedule
- Follows a simple, guided visit workflow
- Captures EVV quickly and accurately
- Completes documentation in real time

Results: Accurate visits, Fewer errors

⚠ WHY IT MATTERS

- Fewer visit corrections
- Improved EVV compliance
- Faster billing readiness
- More time focused on care, not cleanup!



> HHAeXchange+

Note

During the transition from the **Caregiver Mobile App (CMA)** to the **Unified Mobile App (UMA)**, existing users will not need an activation code and can continue accessing the application using their existing credentials.

11:29

HHAEExchange

Real Time Web-Based Management Solutions
for Home Care Agencies & Payers

na @ mail.net

Forgot Password?

Save User ID: Yes

Loading..

Login

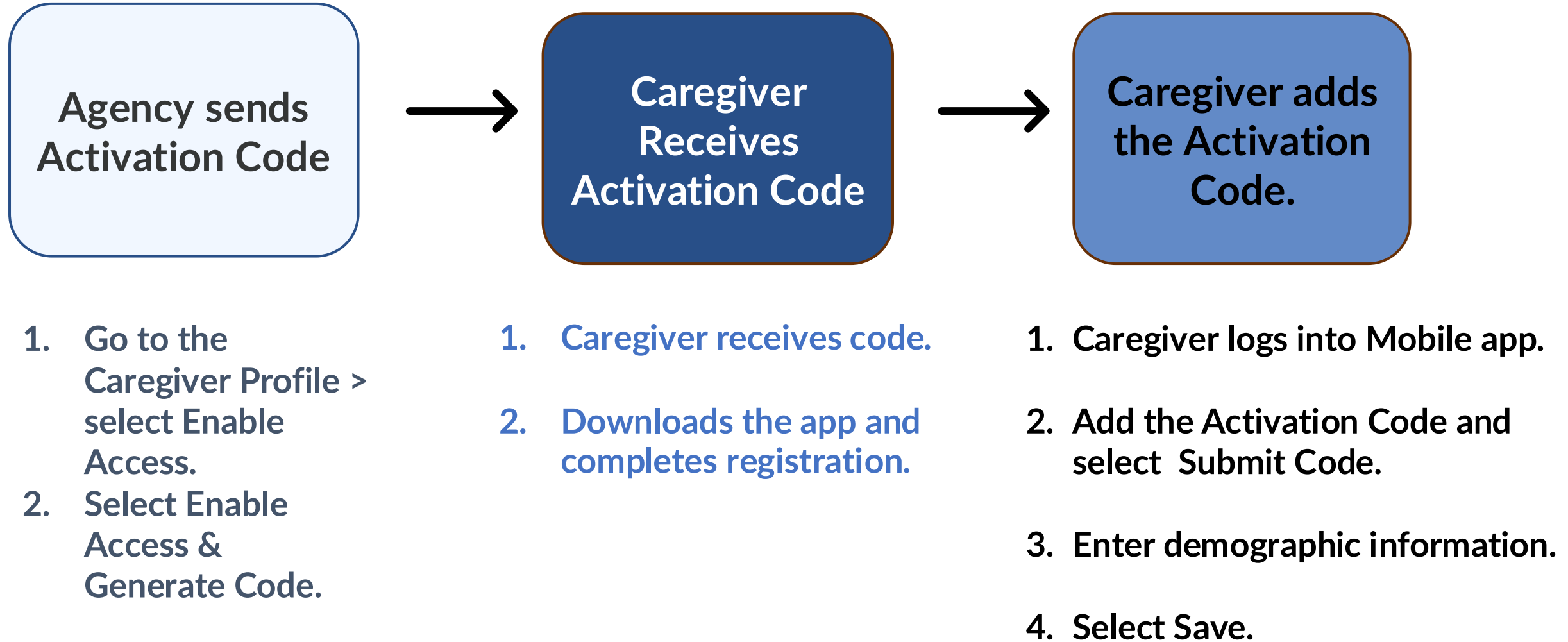
Mobile Device ID: C554A5... Version: 26.05.01

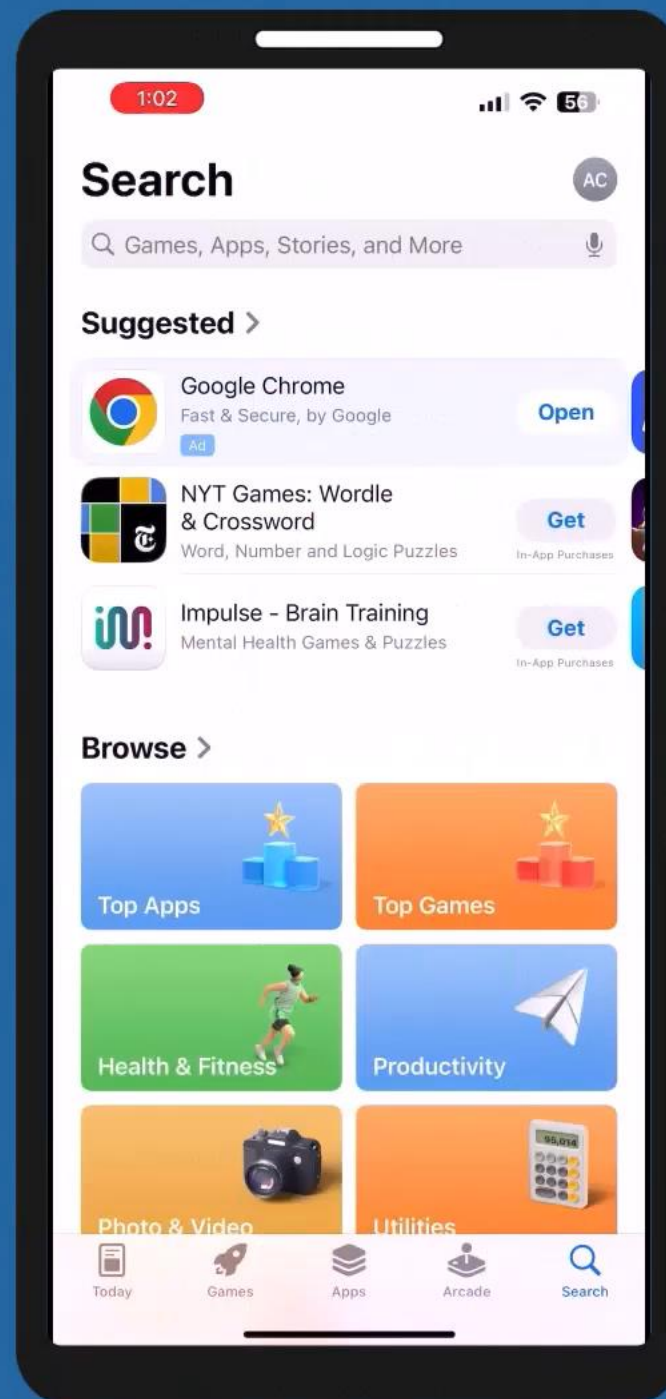
Sign Up

Help Center

Setup & Mobile User Management (+)

➤ Mobile App Setup: Download & Registration





➤ Mobile App Settings: Activation Code

- Sending out the activation code is based on notification preferences.

The screenshot displays the HHAExchange mobile app interface for user Allen Don. The top navigation bar includes links for Home, Patient, Caregiver, Visit, Action, Billing, Payroll, Report, and Admin. The user's name 'Allen Don' is shown with an 'Active' status. Below this, a grid of fields provides personal and professional details: Date of Birth (1987-01-29), Caregiver Code (UMA-1066), Availability Updated (4/5/2024), Address (CHICAGO, IL 60629), Languages, Provider (Office) (UMA Healthcare (PE Training Use Only) (UMA MI office)), Team (Select), and Caregiver Hours (H 0 | V 0). A sidebar on the left lists navigation options: Profile, Compliance, Calendar, Visits, In Service, Rates, Notes, Preferences, Absence/Restriction, Availability, Payroll Info, Pay Check, Patient History, Others, and Document Management. The main content area is titled 'Profile' and contains sections for Demographics (First Name: Don, Middle Name: --, Last Name: Allen, Initials: DA, Gender: Male, Date of Birth: 01/29/1987, Social Security Number: 675-54-7865, Country of Birth: --), Caregiver Information (Caregiver Type: Employee, Caregiver Code: UMA-1066, Secondary Offices: --, Marital Status: --), and Contact Information (Address: CHICAGO, IL, 60629, Primary Phone: --, Secondary Phone: --, Tertiary Phone: --). A 'Chat' button is visible in the bottom right corner.

➤ Mobile User Management (+)

- Centralized management of all HHAeXchange+ Mobile App users, with profile editing and password reset capabilities.

Mobile User Management (+)

Management Search

Office Name

Last 4 SSN

Caregiver Email ID

First Name

Last Name

App Version

Search

Search Results (32)

Office Name	Caregiver Name	Date Of Birth	Phone Number	Last 4 SSN	Email Address	Status	App Version	Edit	Password
UMA healthcare	Nieka Naik	06/15/1992	2298344389	3333	shanieka.naik@yahoo.com	Active	UMA	✎	Reset
UMA healthcare	Sarah Murphy	01/11/1988	2143641366	4242	smurphy@hhaexchange.com	Active	UMA	✎	Reset
UMA healthcare	Alexis Moore	02/26/1990		1234	amoshandrat@gmail.com	Active	UMA	✎	Reset
UMA healthcare	Abby Jay	01/01/1990	2012893347	5452	jannyr83@gmail.com	Active	UMA	✎	Reset
UMA healthcare	jon Franqui	10/06/1998	9737472712	1234	annaapplicant@outlook.com	Active	UMA	✎	Reset
UMA healthcare	Daniel Potocki	01/01/1950		4124	dl4001@gmail.com	Active	UMA	✎	Reset
UMA healthcare	BR Caregiver	09/01/1970		9876	wreilly@hhaexchange.com	Active	UMA	✎	Reset
UMA healthcare	Donald Mobile	08/12/1984	6312735312	3321	donanthonys@optonline.net	Active	UMA	✎	Reset
UMA healthcare	thomas Smalls	04/01/2000		3223	gm108@hotmail.com	Active	UMA	✎	Reset
UMA healthcare	maria Lopez	06/01/1980		1234	mlopezhha@outlook.com	Active	UMA	✎	Reset
UMA healthcare	Lio Menez	01/01/1990	6159551617	1994	rhaji@hhaexchange.com	Active	UMA	✎	Reset

➤ Best Practices for Successful EVV Capture

- Visits can be scheduled so all the important EVV information is captured.
- Review patient address for accuracy to prevent any GPS issues.
- Caregivers and patients should have matching disciplines.
- Caregivers should enable location services to ensure accurate GPS capture.



Visit Capture: Scheduled vs. Unscheduled

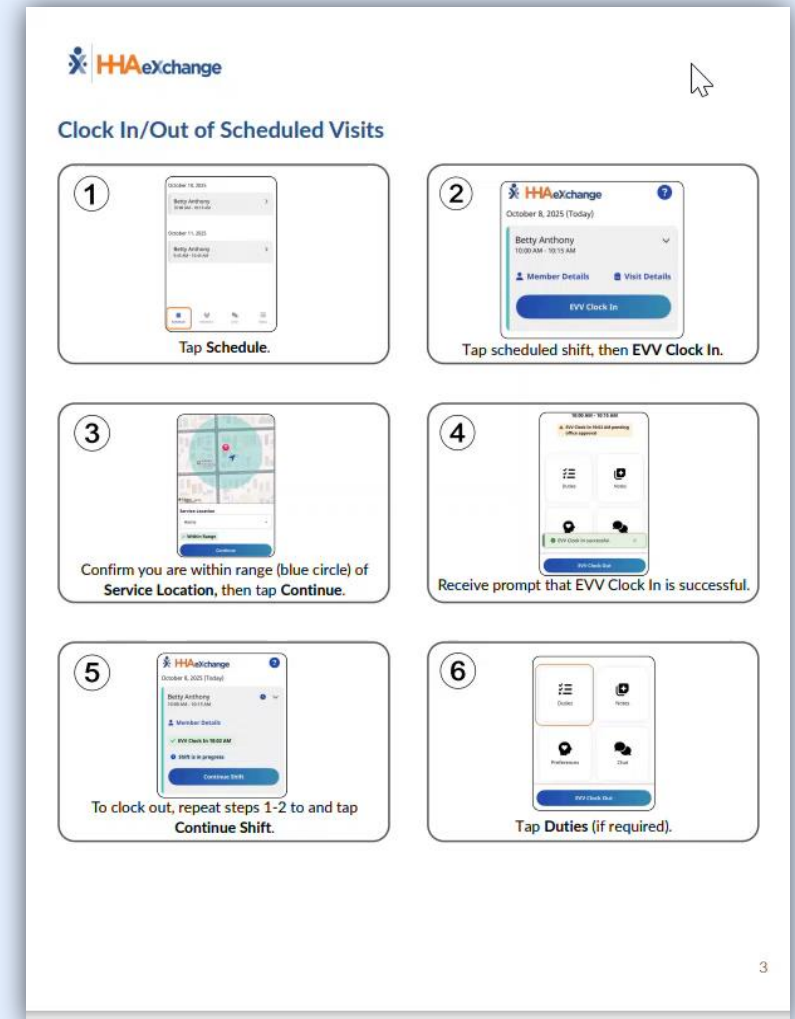
Scheduled Visit

1. Open the HHAeXchange+ App
2. Select the scheduled visit
3. Clock in and clock out

Unscheduled Visit

1. Open the HHAeXchange+ App
2. Create an unscheduled visit
3. Select the member and begin EVV

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

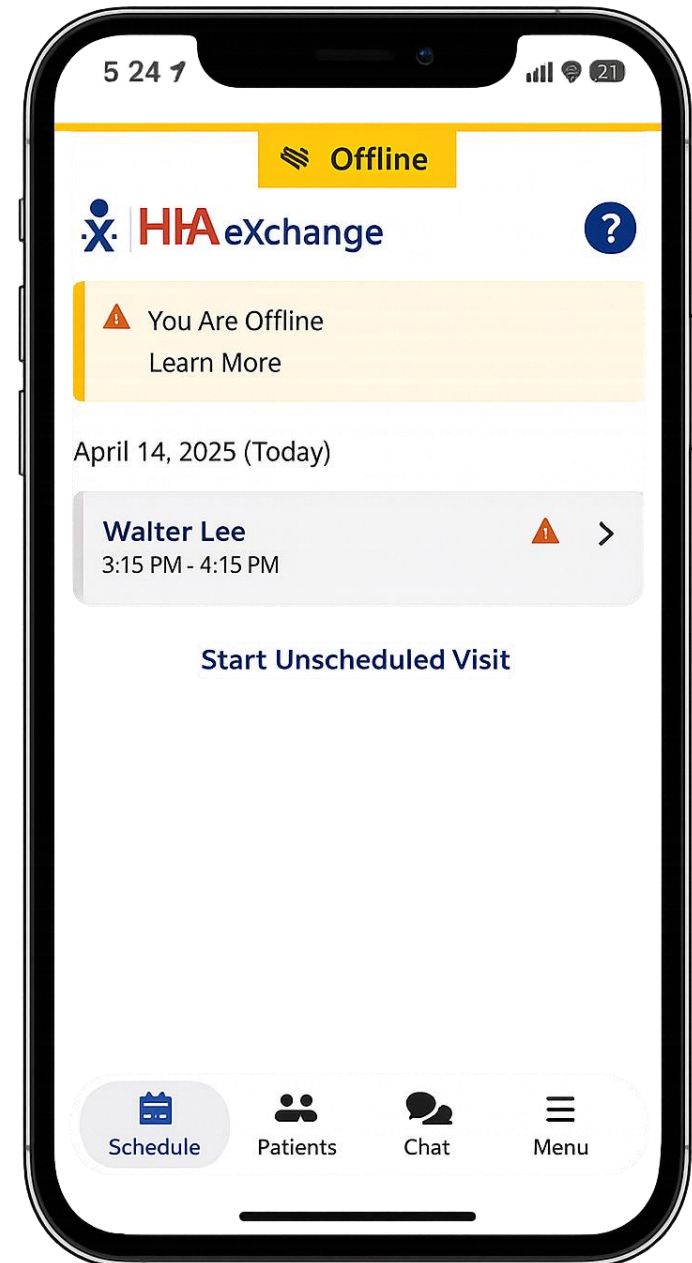


➤ Enhanced Offline Mode

Offline Mode

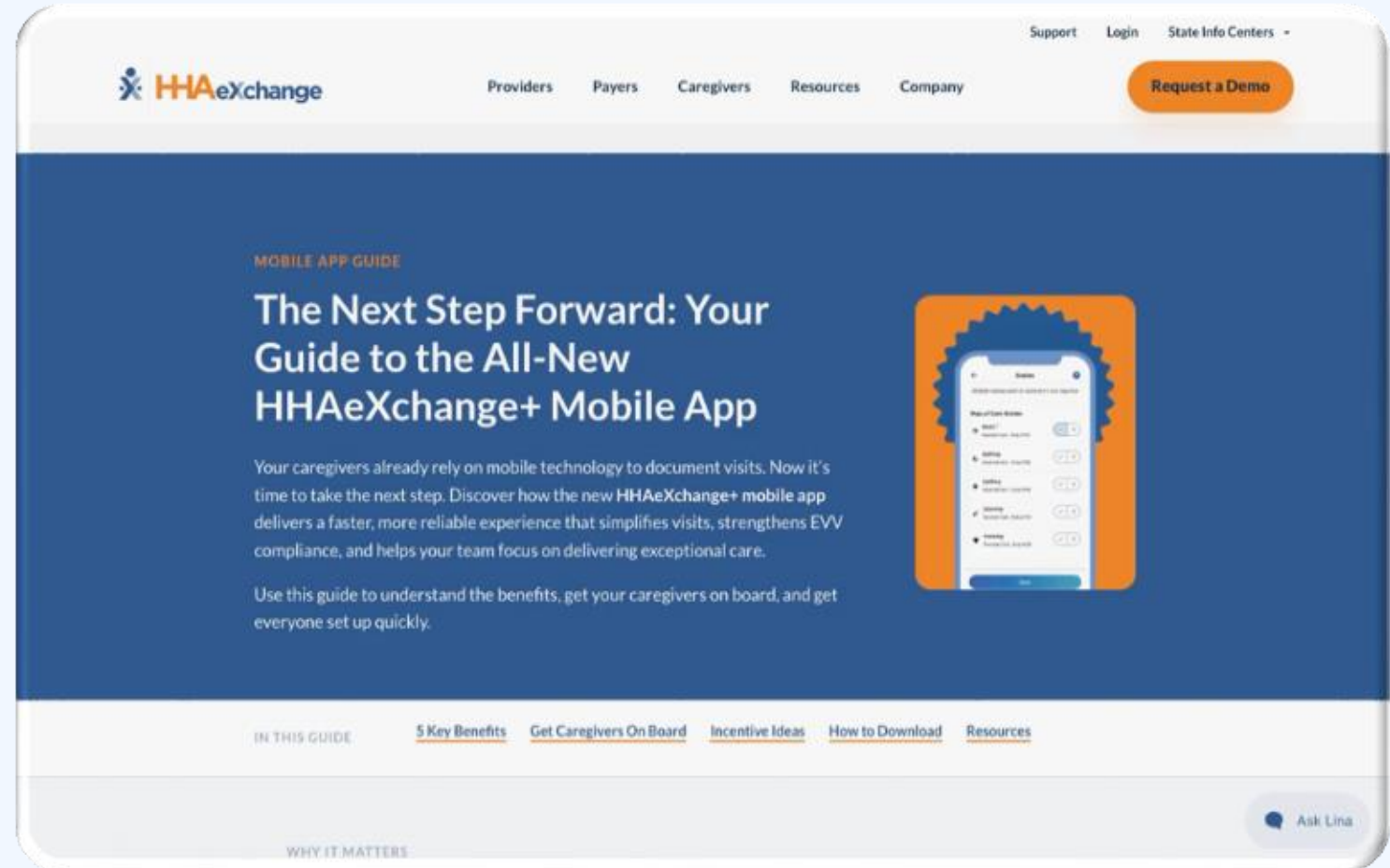
- **No signal? No problem.** Caregivers can complete EVV clock-ins and clock-outs without connectivity.
- Reliable offline access. Secure Offline PIN login keeps visits on track until connectivity is restored.

[HHAeXchange+ Caregiver User Guide](#)



LEARN MORE

The Next Step Forward: Your Guide to the All- New HHAeXchange+ Mobile App





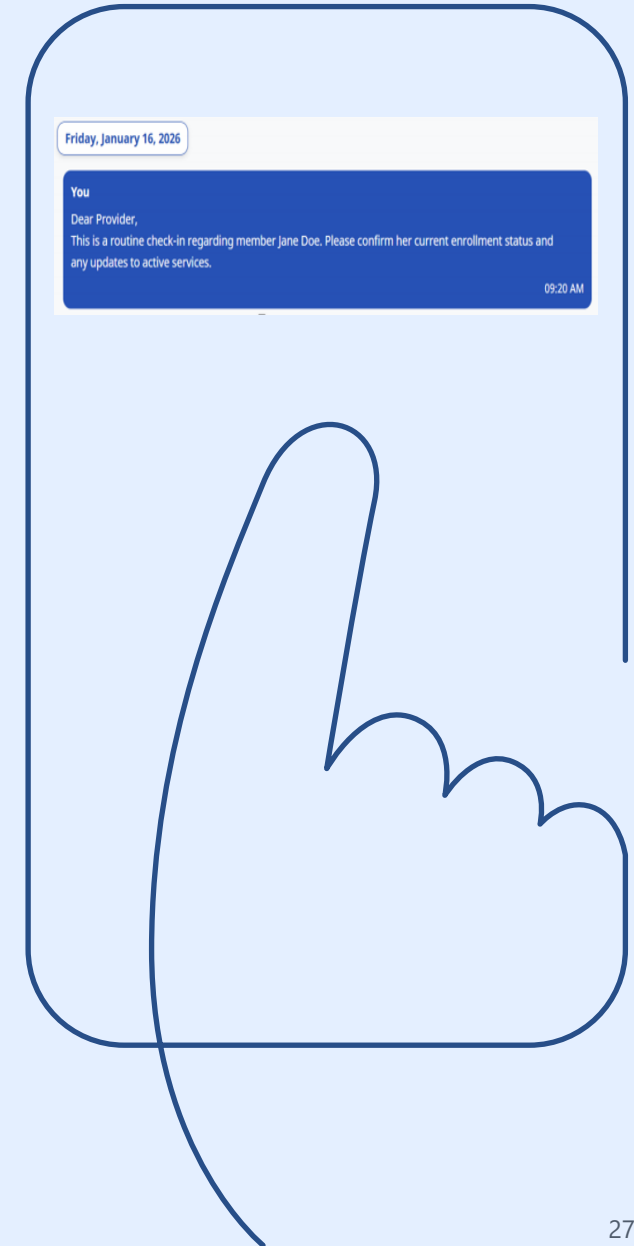
Conversations

➤ What is the Conversation Feature?

A secure messaging platform within HHAeXchange that connects:

- Providers
- Payers
- Members
- Representatives
- Caregivers

★ All within one secure system

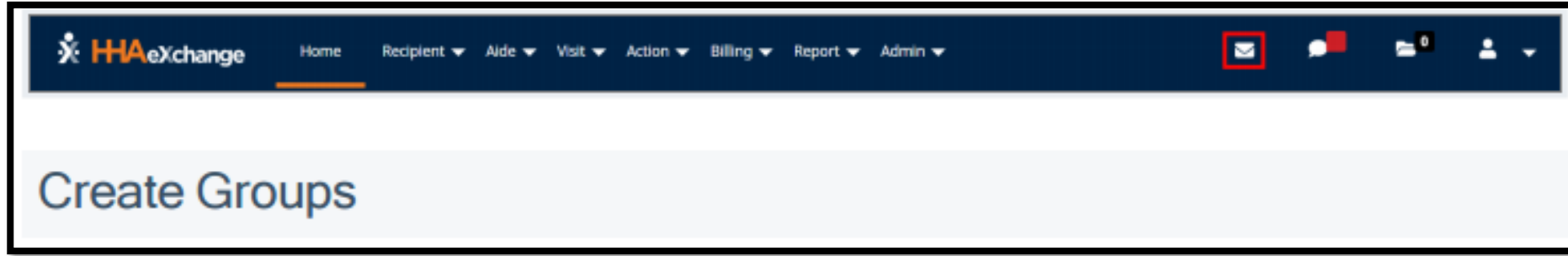


➤ Why Conversations Matter?

- Centralizes communication across payers, members, caregivers, and internal teams
- Reduces delays caused by fragmented email and phone outreach
- Creates a documented audit trail tied to the member
- Improves accountability and response visibility
- Supports compliance and operational efficiency



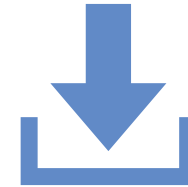
➤ Accessing Conversations



Click the **Envelope icon**
in the top navigation bar



Opens the
Conversations Module



View Active & Archived
conversations

Creating & Managing Groups

> Groups

Before starting a conversation, create a Provider Group.

- Ensure the right team members receive messages
- Maintain continuity if someone is unavailable
- Organize internal communication
- Keep membership updated to prevent workflow gaps



Best Practice: Create groups based on operational workflow, not individuals.

➤ How to Create/Edit Groups



Click **Groups**

Click + **Add Group**

- **Enter:** Group Name, Select Group Type & Add Users

Click **Create Group**



Click **Groups**

- Select **Edit** to update
 - Group Name / Type / Users
- Click **Update Group**



Starting a Conversation & Responding to Messages

➤ Starting a New Conversation

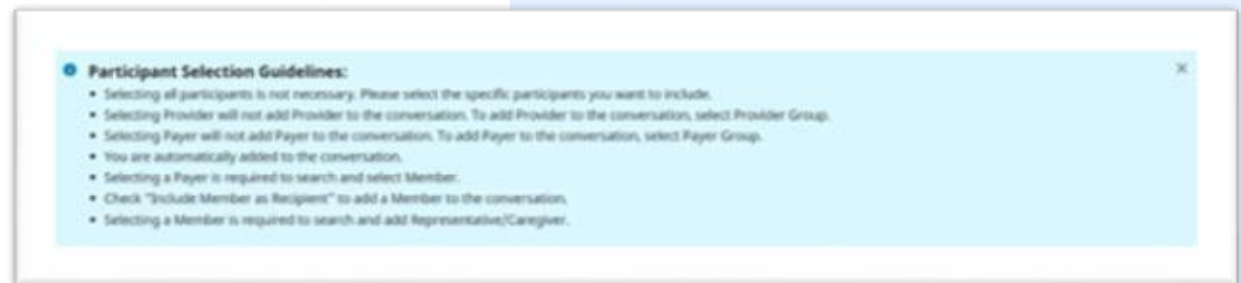
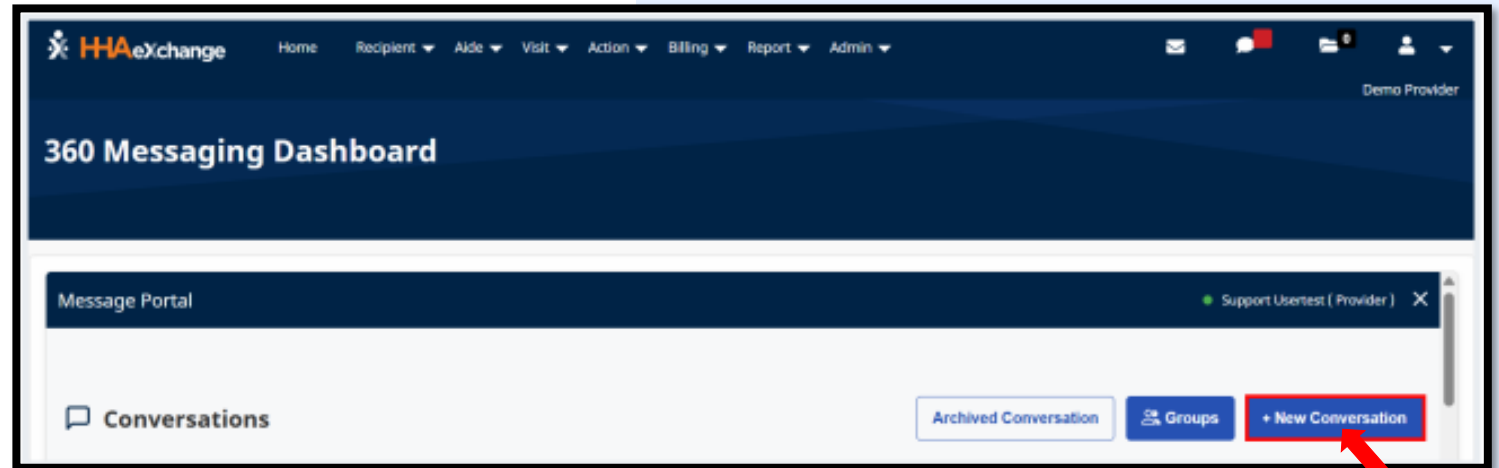
1. Click **+ New Conversation**

2. Select:

- Provider Group
- Provider User (if applicable)

3. Add recipients:

- Payer
- Payer Group
- Member
- Member Team
- Representative
- Caregiver



Upcoming Update to Participant Selection Guidelines

➤ Associating Conversations to Members

- Supports compliance and audit readiness
- Enables caregiver inclusion (when applicable)
- Prevents disconnected communication trails
- Improves care coordination visibility

Note: Entering a Member name only associates the message with that Member. To make sure the Member sees the message, select the **Include Member as Recipient** checkbox.



Include Member as Recipient



Reminder: Select 'Include Member as Recipient' if the member should receive the message.

› Completing the Message

- Enter Subject
- Enter Message
- Select Priority
- Click **Start Conversation**

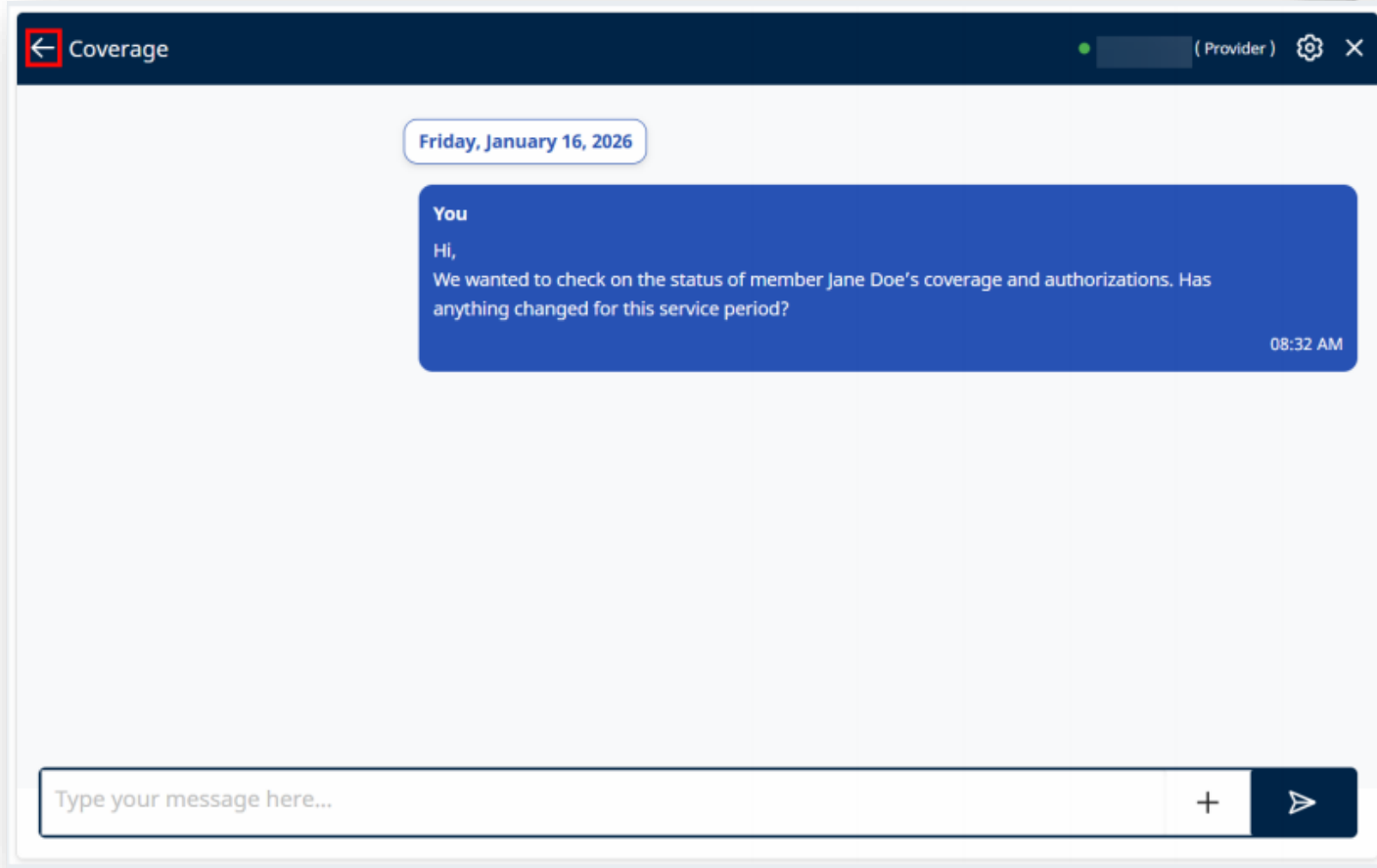
The screenshot shows a 'New Conversation' form with the following fields and options:

- Provider:** App - Demo
- Provider Group:** Demo Org Group
- Provider User:** All selected
- Payer:** Demo
- Payer Group:** Select one or more
- Member:** Demo
- Include Member as Recipient:** ☐
- Member Team:** Select one or more
- Representative:** (empty)
- Caregiver:** Type to Search
- Subject:** Coverage
- Message:** Hi, We wanted to check on the status of member Jane Doe's coverage and authorizations. Has anything changed for this service period?
- Priority:** Normal Priority
- Buttons:** Start Conversation (highlighted with a red arrow), Cancel

Participant Selection Guidelines:

- Selecting all participants is not necessary. Please select the specific participants you want to include.
- Selecting Provider will not add Provider to the conversation. To add Provider to the conversation, select Provider Group.
- Selecting Payer will not add Payer to the conversation. To add Payer to the conversation, select Payer Group.
- You are automatically added to the conversation.
- Selecting a Payer is required to search and select Member.
- Check "Include Member as Recipient" to add a Member to the conversation.
- Selecting a Member is required to search and add Representative/Caregiver.

➤ The conversation then opens, showing your message.



➤ Respond to a Conversation

- Notification symbol appears
- Click on the message
- Type your response
- Click Send

The screenshot shows the 'Message Portal' interface with a 'Conversations' section. It features a 'Search Conversations' form with fields for Subject, User Role, User Name, and Group Name. There are also radio buttons for Read/Unread status and Last Message In timeframes (Last 30 Days, Last 60 Days, Last 90 Days). A Priority dropdown menu is also present. Below the search form, there are 'Search' and 'Clear' buttons. Underneath, there is a section for 'Active Conversations' with tabs for 'Active' and 'Archived'. A red box highlights a message titled 'Check In' with a notification icon and a timestamp of 9:52 AM.

The screenshot shows a detailed view of a conversation titled 'Check In'. The header includes a back arrow, the title 'Check In', and a user profile icon. The date 'Friday, January 16, 2026' is displayed. The conversation history shows two messages: a light blue message from 'Check In' at 09:52 AM and a dark blue message from 'You' at 10:04 AM. The 'You' message is a response to the 'Check In' message. At the bottom, there is a text input field with the placeholder 'Type your message here...' and a send button.

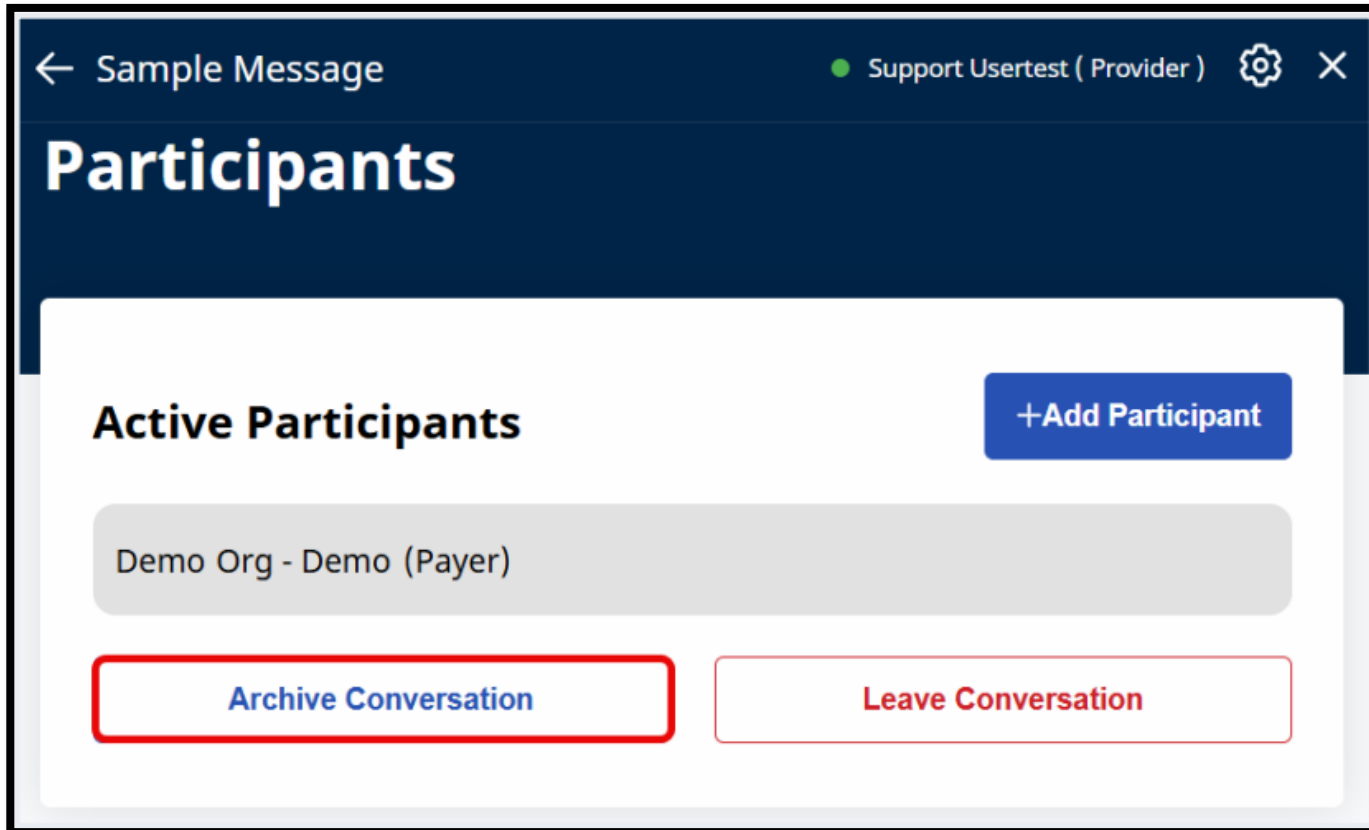
Archiving & Managing Conversations

➤ Archive a Message

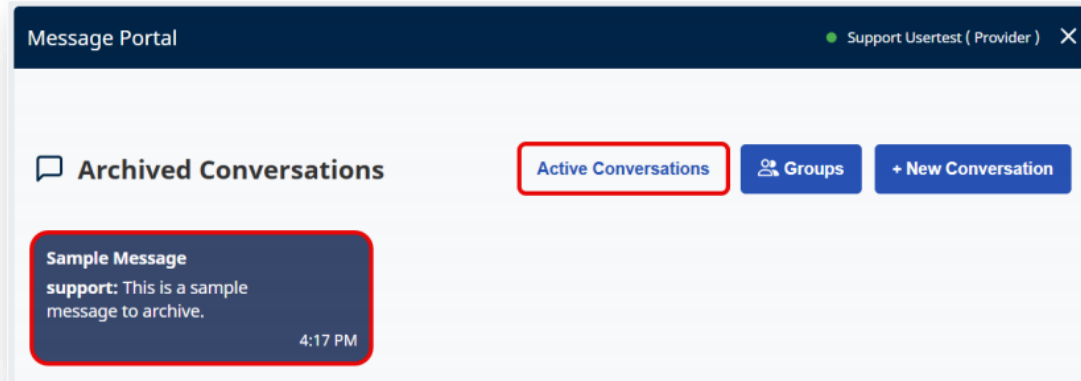
Auto-archives after 30 days with no response.

Manual archive:

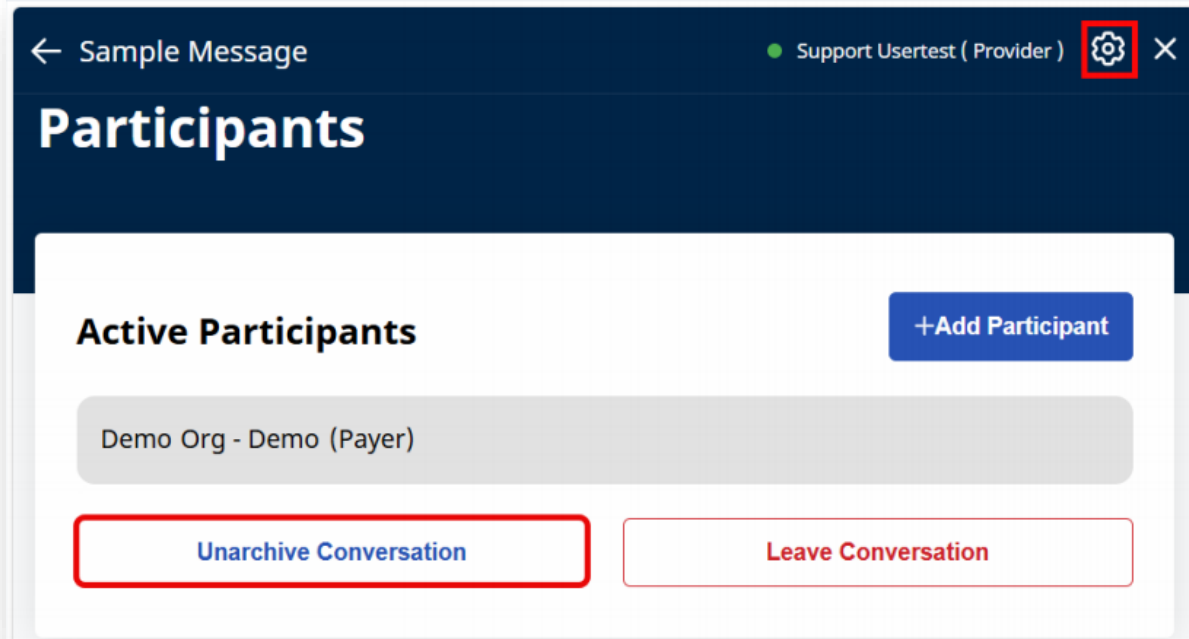
1. Open conversation
2. Click gear icon
3. Select **Archive Conversation**
4. Confirm



➤ Viewing & Unarchiving



- Click **Archived Conversations**
- Toggle back to Active
- Use **Unarchive** if needed



Hello 15thoctreview

- Placements
- Events
- System Notifications
- Direct Messages
- Tasks
- Linked Communication

Search System Notifications

Priority

All ▾

Status

All ▾

From

mm/dd/yyyy 

To

mm/dd/yyyy 

Search



Caregivers Mobile Messaging

➤ Why Caregiver Mobile Messaging Matters

- Reduces inbound calls to the office
- Keeps field communication documented
- Improves response time
- Keeps everyone aligned in real time

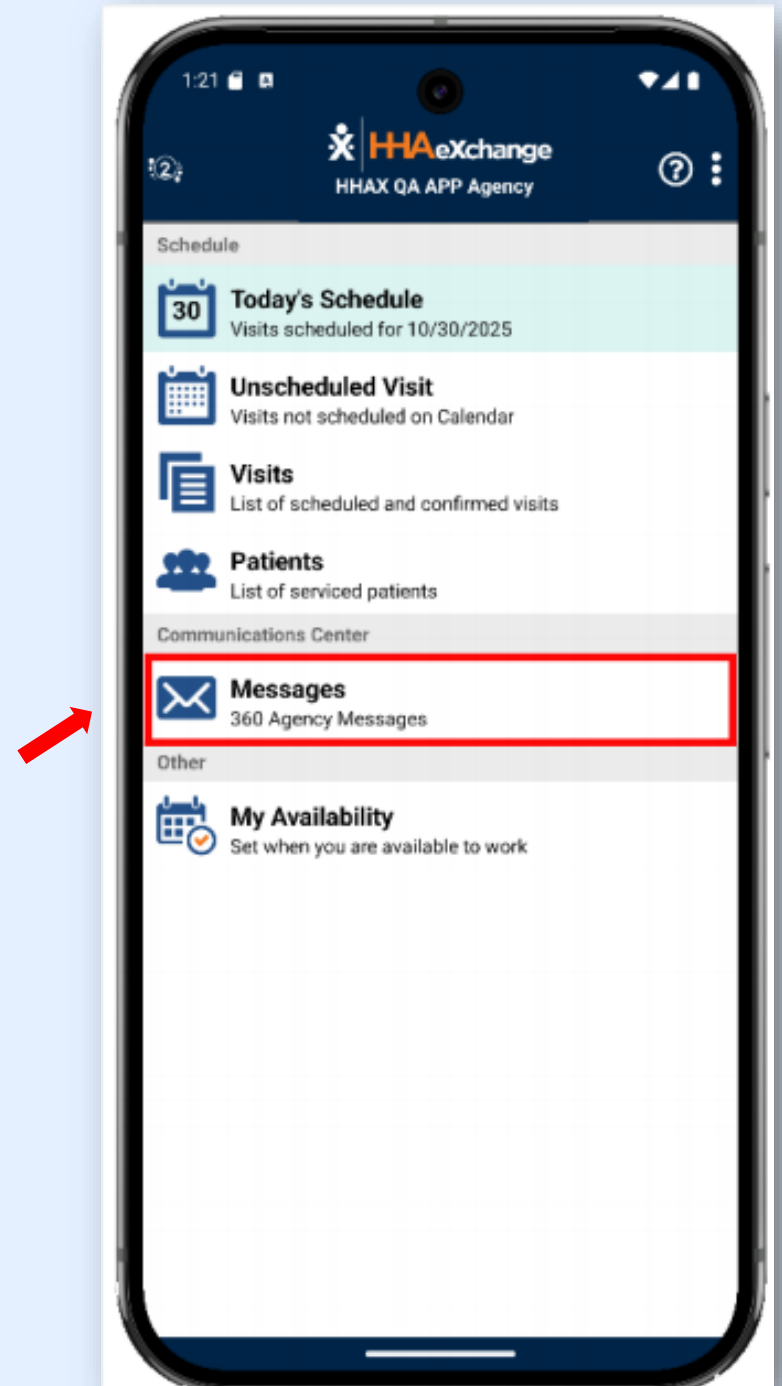
Note: Providers must grant caregivers access to use Conversations. Access is managed at the office level.

☐ Allow Users and Service Providers to use 360 Messaging service ⓘ



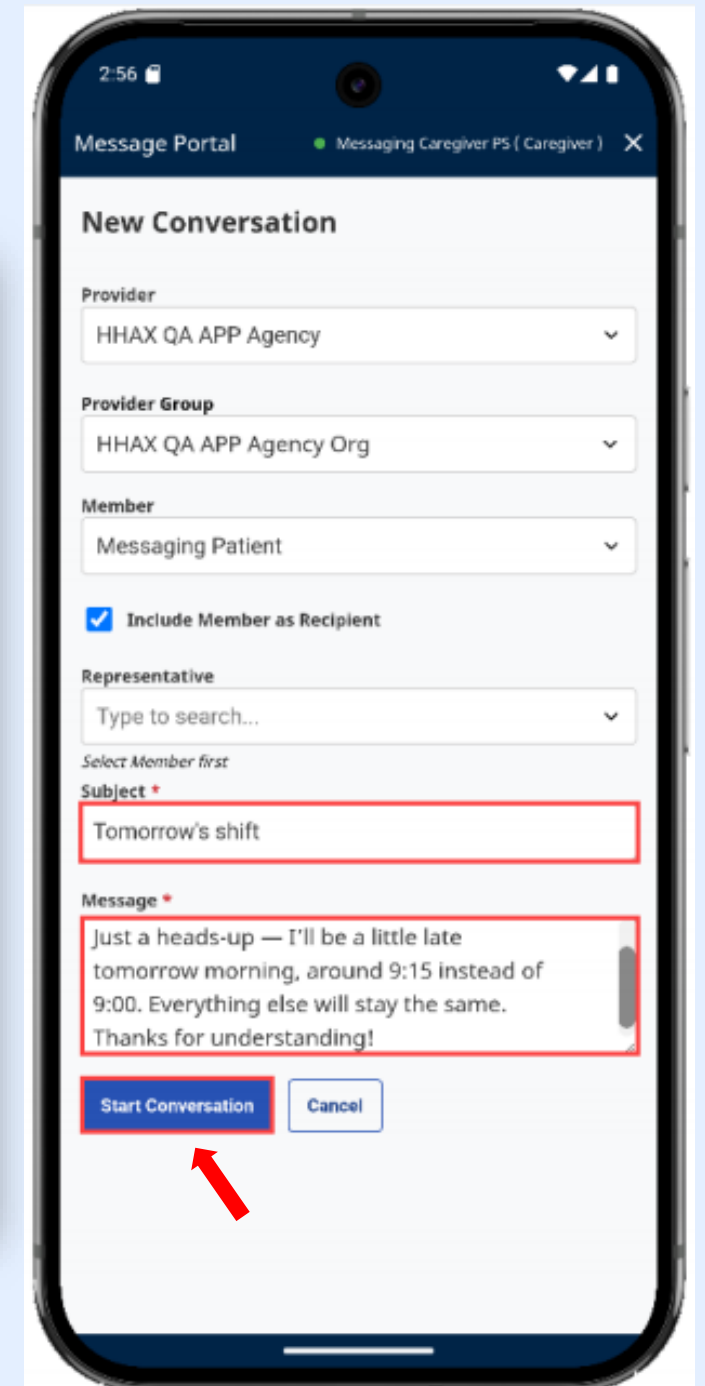
➤ Caregiver Messaging from the Mobile App

- Secure messaging directly in the HHAeXchange Mobile App
- Caregivers can:
 - Start a conversation
 - Respond to messages
 - Receive notifications
- Keeps communication centralized and documented



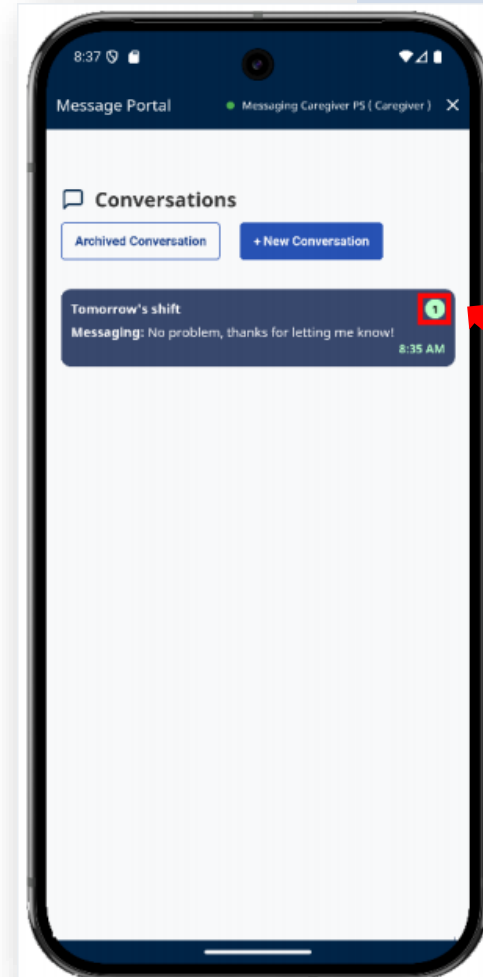
➤ How Caregivers Start a Conversation

1. Tap **+ New Conversation**
2. Select Provider & Provider Group
3. Choose recipients:
 - Member (optional checkbox)
 - Representative
4. Enter Subject & Message
5. Tap **Start Conversation**



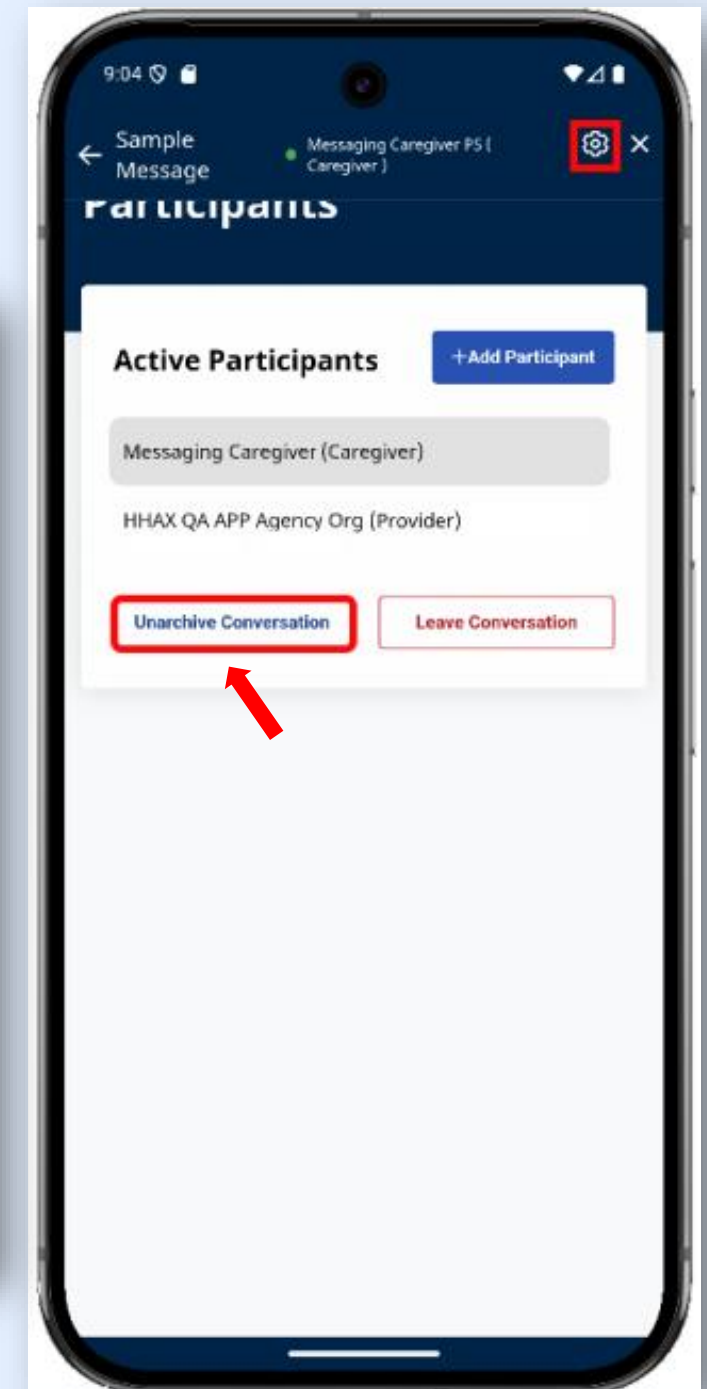
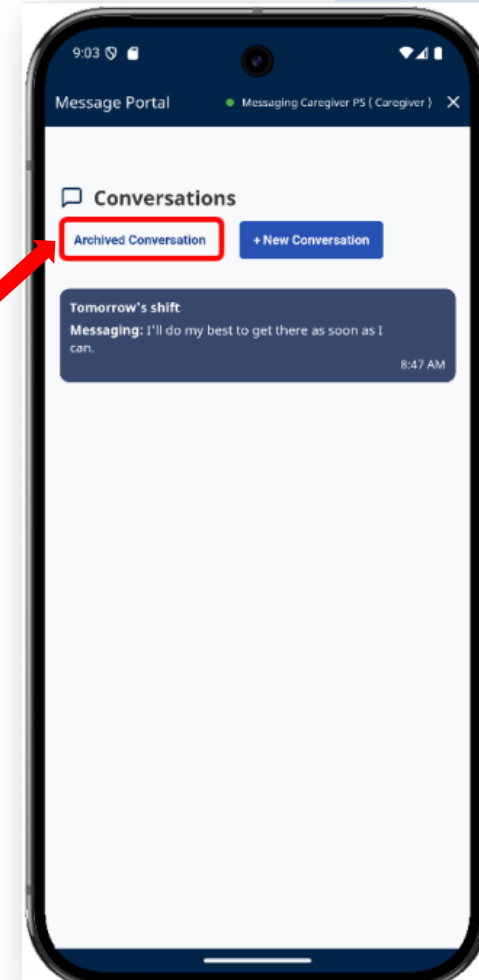
➤ Responding to Messaging in the Mobile App

- Notification appears in Conversations section
- Tap the message
- Type response
- Tap Send
- Threaded history remains visible



➤ Managing Conversation in the Mobile App

- Auto-archive after 30 days with no response
- Manual archive via gear icon
- View archived conversations
- Unarchive if needed





Key Takeaways & Resources

➤ Key Takeaways

Smarter communication. Stronger teams. Better care.

Smarter Mobile Experience for Caregivers

- ✓ Easier EVV capture, fewer errors, greater confidence

Compliance by Design

- ✓ Fewer exceptions, less rework, better outcomes

Work Anywhere, Anytime

- ✓ Secure Offline Mode and real-time mobile access

Centralized Communication

- ✓ One secure platform for providers, caregivers, and members

Better Visibility & Accountability

- ✓ Member-linked conversations and a complete audit trail

Resources



State Info Hub

Provider Information Center

To ensure you stay up to date on all the information, please visit our Mississippi 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



A screenshot of the HHAeXchange website's Mississippi Information Center. The header includes the HHAeXchange logo and navigation links: Solutions, Partner Connect, Resources, State Info Hub, Company, Login, and a Request Your Demo button. The main banner features a map of Mississippi and the title "Mississippi Information Center" with a button for the "EVV Provider Portal Set Up Form". A sidebar on the left contains a "TABLE OF CONTENTS" with links to Overview, Information Sessions, Frequently Asked Questions, Services, EDI Process, and Contact. The main content area is titled "Electronic Visit Verification Solution for the Mississippi Division of Medicaid (MS DOM)" and provides details about the partnership with FEI systems and HHAeXchange, including a link to a kickoff letter and a deadline of August 1, 2023. It also includes a button for the "EVV Provider Portal Set Up Form".

[Mississippi Information Center](#)

➤ Provider Resources: HHAeXchange Provider 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+ Mobile App Caregiver User Guide



[HHAeXchange+ Caregiver
User Guide](#)

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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!

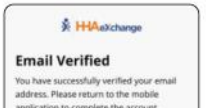
Getting Started: Download, Sign Up, and Register

- 

Download HHAeXchange+ app.
- 

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

Tap **Sign Up Here**.
- 

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

Email Verified
You have successfully verified your email address. Please return to the mobile application to complete the account.

thank you