



HHaExchange+ Mobile App Caregiver Guide EVV

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HHAExchange+ Mobile App Caregiver Guide

Overview

The **HHAExchange+ Mobile App** is a tool used to place Electronic Visit Verifications (EVVs), review Patient and Visit information, manage Availability, and perform other administrative tasks. The Mobile App is available for both iPhone and Android users. This documentation covers Mobile App functions and setup performed on the Caregiver’s device.

Please direct any questions regarding the content of this document to [HHAExchange Client Support](#). Refer to the **Help** in the Mobile App for immediate questions or tap the link to contact support for further assistance.

Some Mobile App features are activated by System Administration. Please contact [HHAX Support Team](#) for details, setup, and guidance.

Mobile App Data Retention

Caregivers have access to the following number of days of historical data on the Mobile App:

- Patient List - Includes Patients serviced during the past 30 days plus other Patients assigned to the Caregiver by the Agency/Employer.
- Patient Search - Up to 365 days (starting with 90 days at migration to the HHAExchange+ Mobile App).

Accessibility

The HHAExchange+ Mobile App adheres to W3C's Web Content Accessibility Guidelines (WCAG). The Mobile App screens include color contrasts, button color changes, and icons or markings to achieve this.

HHAX System Key Terms and Definitions

Basic definitions of HHAX System key terms applicable throughout the document are listed in the following table.

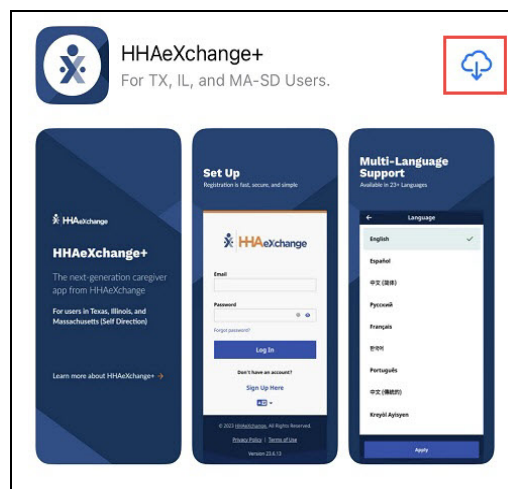
Term	Definition
Patient	Refers to the Member, Consumer, or Recipient. The Patient is the person receiving services.
Caregiver	Refers to the Aide, Homecare Aide, Homecare Worker, or Worker. The Caregiver is the person providing services.
Provider	Refers to the Agency, Employer, or organization coordinating services.
Payer	Refers to the Managed Care Organization (MCO), Contract, or Health and Human Services (HHS). The Payer is the organization placing Patients with Providers.
HHAX	Acronym for HHAExchange

Downloading the Mobile App

The HHAExchange+ Mobile App is available for download through the App Store or Google Play for iPhone or Android devices.

Caregivers are responsible for downloading and installing the HHAExchange+ Mobile App onto their personal mobile device.

To locate and download the App, enter the keyword *HHAExchange+* in the search bar of the App Store or Google Play.



App Store

Caution: Be sure to download the *HHAExchange+* app, not the older HHAExchange mobile app.

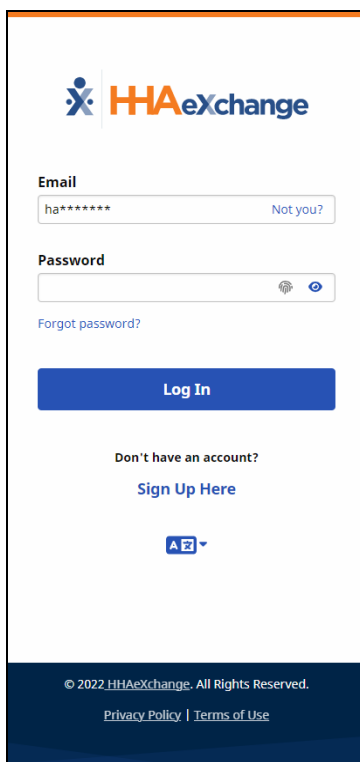
After installing the Mobile App, Caregivers must use the app to Sign Up with HHAX and connect to one or more Agencies in order to use the Mobile App.

Sign Up Here

Note: The first time you open the Mobile App, you must select your preferred language and tap **Apply**.

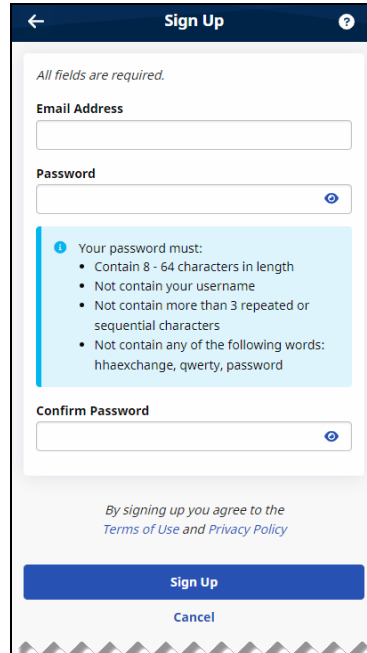
To sign up for and log in to the Mobile App,

1. From the *Login Page*, tap **Sign Up Here**.



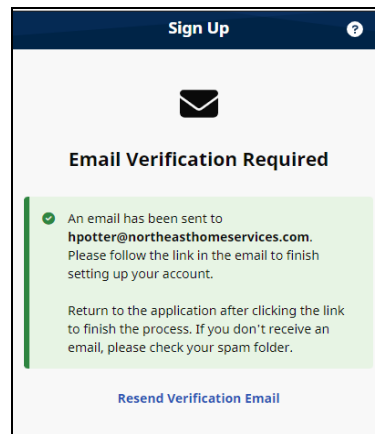
Log-In Page

2. On the *Sign-Up* page, type your **Email Address** and a strong **Password**.
Tip: Tap the eye icon to see your **Password** entry.
3. Type your password again in **Confirm Password**, and then tap **Sign Up**.



Sign Up Here

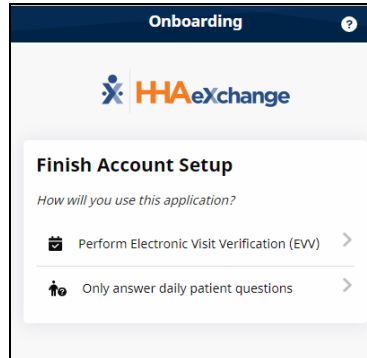
4. On the *Email Verification Required* page, follow the instructions to open the verification email sent to your email address by HHAX, and then follow the instructions in the email to proceed with on-boarding.



Email Verification

Note to HHAeXchange Services Portal users: If you sign up for the Services Portal before signing up for HHAeXchange+, you must still enter your Email Address and Password to sign up for HHAeXchange+. If you sign up for HHAeXchange+ first, after you verify the Email Address, you can use the same credentials to log into the Services Portal as well.

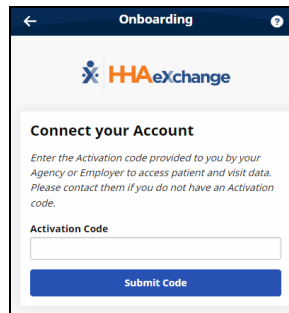
5. When the *Finish Account Setup* page is displayed, answer the question: "How will you use this application?" If you are instructed by your Agency/Employer to use the app for EVV and to document your visit/shift detail, tap **Perform Electronic Visit Verification (EVV)**. If you are only using the app to answer *Care Insights* questions, tap **Only answer daily patient questions**.



Finish Account Setup

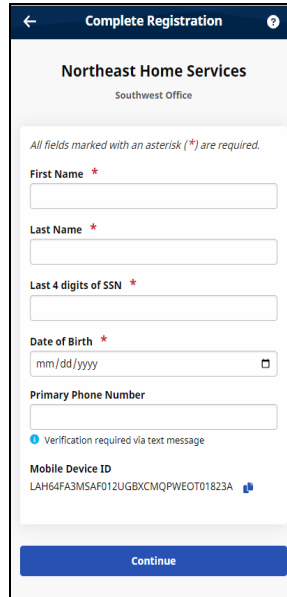
When you tap **Perform Electronic Visit Verification (EVV)**...

- a. On the *Connect your Account* page, type the **Activation Code** provided by the Agency/Employer via email or text (valid for 7 days), and tap **Submit Code**.



Activation Code

- b. On the *Complete Registration* page, complete all required fields (marked with *****) and then tap **Continue**.



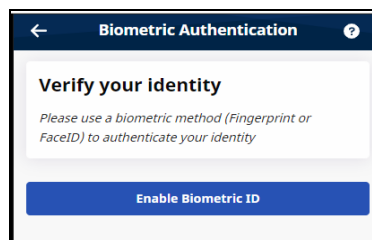
Complete Registration

Note: You must respond to an email verification of your **Primary Phone Number** before you can continue.

- c. If your Agency/Employer uses Two-Factor Authentication and the *Biometric Authentication* page is displayed, tap the method you will use to verify your identity.

If you tap **Use your fingerprint**, when prompted, place your identifying finger on your phone’s fingerprint sensor.

If you tap **Use facial recognition**, when prompted, orient your front-facing camera toward your face.



Biometric Authentication

- d. If the *Third-Party Terms* page is displayed, read the terms and acknowledge them by tapping **Accept Terms**.

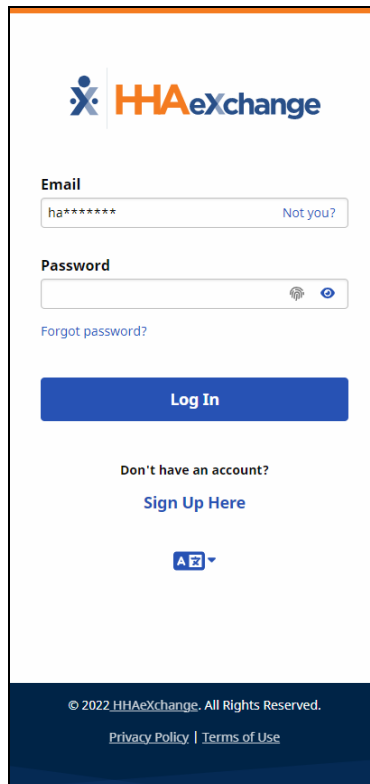
Note: You must log in at least one time with Email and Password before using Biometric Authentication.

You are logged in, and the *Schedule* page is displayed.

Log In Page

From the Log In page, you can perform the following tasks:

- [Log In](#) to the Mobile App.
- [Sign Up Here](#) to use the Mobile App if you have not already been set up to use the Mobile App.
- Change the Mobile App User Password with the [Forgot Password](#) function.
- Change the language in which the Mobile App and Mobile App Help are displayed by tapping the [Select Language](#) icon.



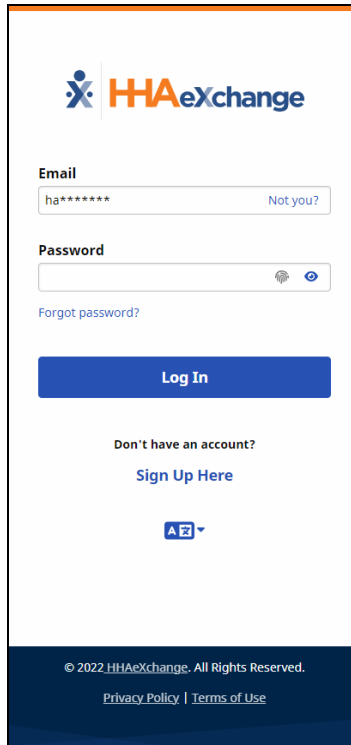
Log In page

Note: From the Log In page footer, you can access the Mobile App's **Privacy Policy** and **Terms of Use**.

Log In

To log in to the Mobile App,

On the *Log In Page*, type your valid **Email Address** and **Password**, and then tap **Log In**. If prompted to do so, select your Agency/Employer.



Log-In Page

You are logged in, and the *Schedule* page is displayed.

If you log in before the Sign-Up process has been completed, you are returned to the Sign Up page.

Tip: Tap **Not you?** in **Email** to enter a different Email Address.

Tip: To see the characters entered in **Password**, tap the eye icon in the **Password** field.

Note: You can tap an enabled fingerprint icon in the **Password** field to use a Biometric Log In (Fingerprint or Facial ID).

Biometric Log In

You can log in with *Fingerprint Authentication* or *Facial Recognition* if the capability is enabled on your phone.

For Biometric Log In to be available, you must have logged into the Mobile App using **Email** and **Password** at least one time. After that, you can tap the fingerprint icon at the right of the **Password** field to access your phone's fingerprint authentication or facial recognition biometric page.

Note: If the Agency/Employer requires *Two Factor Authentication*, you must also provide a **Password** on the *Log In* page before tapping the fingerprint icon.

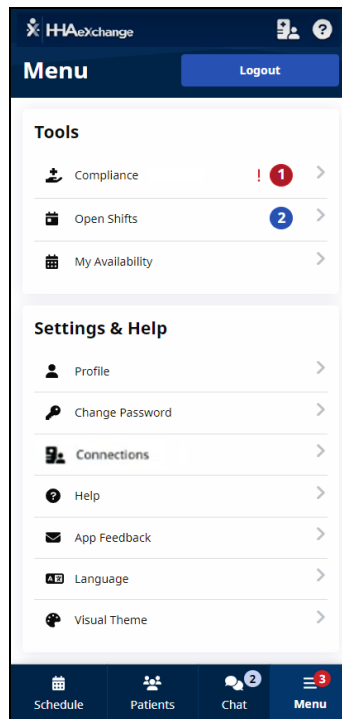
After providing a matching fingerprint or facial scan, you are allowed access to the Mobile App.

Note: If you change or reset your password, the Biometric Log In option is reset. You must log into the Mobile App using **Email** and **Password** and log out at least one time before the Biometric Log In option becomes available again.

Menu

Using the Mobile App, you can keep track of your schedule, receive and respond to messages from your Office/Agency, and Clock In and Out of Visits.

The Menu is divided into three sections (**Tools, Settings & Help, Legal**) with a **Navigation Bar** displayed at the bottom.



Menu

Tools

Compliance

If configured by the Agency, used to review your [Caregiver Compliance](#) status (based on Discipline), tracking completed and upcoming medical and evaluation due dates.

Open Shifts

If configured by the Agency, used to review and [request open shifts](#) as broadcast by the Agency/Office.

My Availability

If configured by the Agency, allows you to review and adjust your schedule [Availability](#) preferences.

Settings & Help

Profile

Used to maintain your [Caregiver information](#).

Change Password

Used to [change your Mobile App Login password](#).

Connections

Used to switch between [Agencies/Offices](#) connected to you, the Caregiver.

Help

Used to access the Mobile App Help table of contents. Context-sensitive Help is available from most Mobile App pages by tapping the Help icon (question mark) at upper right.

App Feedback

Used to [request enhancements, provide general comments, identify issues, and correct alternate language translations](#).

Select Language

Used to [change the language](#) in which the Mobile App and Mobile App Help are displayed.

Visual Theme

Used to change the mobile app display from the default Standard to a Dark or High Contrast theme.

Legal

Privacy Policy

Notice of privacy limits when using the Mobile App.

Terms of Use

HHAX terms, conditions, and restrictions under which you may or may not use aspects of the Mobile App.

Third Party Terms

If configured by the Agency, third-party software developer terms, conditions, and restrictions under which you may or may not use aspects of the Mobile App.

Navigation Bar

Schedule

Used to [Clock In and Out](#) of Scheduled Visits and to review all Scheduled Visits up to two weeks in advance (and up to one week in the past). You can create an Unscheduled Visit for any Patient to whom you have access from the *Schedule* page by tapping **+New Unscheduled Visit**.

Patients

Used to view a list of all [Patients](#) you can access. You can create an Unscheduled Visit for any Patient to whom you have access from the *Patients* page by tapping **New Visit**.

Chat

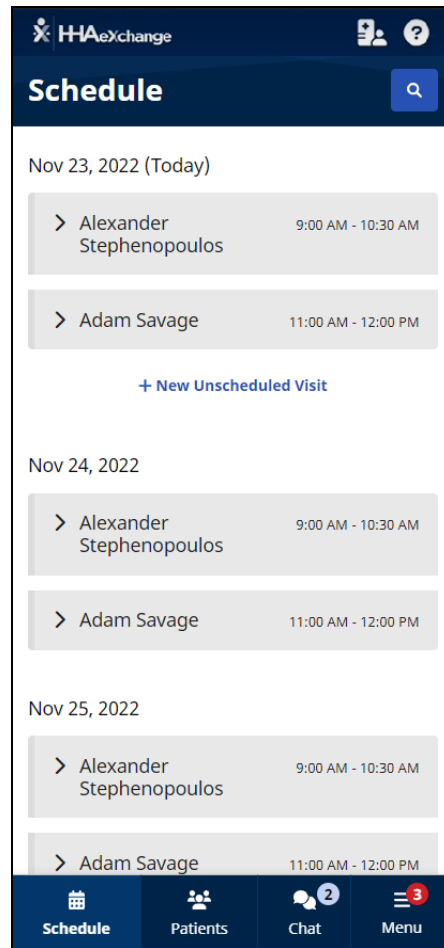
Used to [chat](#) with the Agency using HHAX's *Two-Way Mobile Chat* feature.

Menu

Returns you from any point in the Mobile App to the Menu.

Schedule Visits - Clock In/Clock Out

From the *Schedule* page, you can Clock In and Out of a Visit, entering Plan of Care Duties and gathering required Signatures.



Schedule page

The *Schedule* page shows your scheduled visits for today and tomorrow. You can tap the **Search** icon (magnifying glass) at top right to view previous visits.

Select from the following Visit Types for specific instructions:

[Scheduled Visit](#)

[Unscheduled Visit](#)

[Consecutive Shifts](#)

[Linked and Mutual Patients](#)

Tip: You can [change Connections](#) by tapping the **Change Connection** icon at top right (beside the *Help* icon) on the Schedule Page.

Note: If configured by the Agency, you can edit a visit that has already transpired. From the *Schedule* page, expand the visit and tap **View/Edit Visit** to adjust the duties associated with the visit. If allowed, from the *Visit Details* page, you can tap **Edit Visit Time** (upper right) to adjust Clock In and Clock Out times.

Scheduled Visit

To Clock In for a Scheduled Visit:

1. From the *Schedule* page, select the patient visit to expand Visit Details.

From the Visit Details, you can view:

Schedule Time - Scheduled Start Time and End Time of Visit. (For Daily Variable Visits, displays the authorized duration of the Visit and a clock tracking the Visit time used.)

Visit Type - Skilled or Unskilled

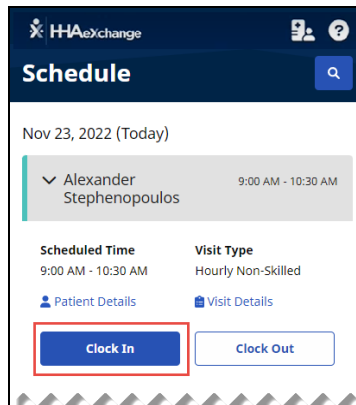
Patient Details - Patient Name, Admission ID, assigned Office, Phone Numbers, Addresses, Emergency Contacts, and, if configured, Clinical Information

Visit Details - If configured, Plan of Care Tasks, Care Insights Questions, Medications, and [Add Note](#)

Note: If the patient visit is not on the Schedule page, tap **+New Unscheduled Visit** to create an [Unscheduled Visit](#).

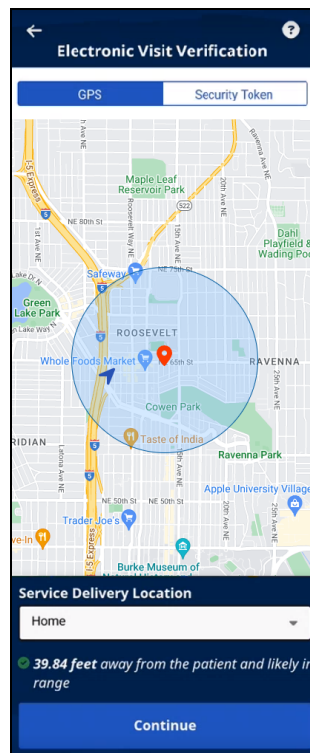
If you don't see a particular Scheduled Visit, tap the **Search** icon (magnifying glass) at the top of the page to search for a Shift by **Patient Name**, **Date Range**, and **Visit Type**.

2. From the Visit Details, tap **Clock In**.



Scheduled Visit Details

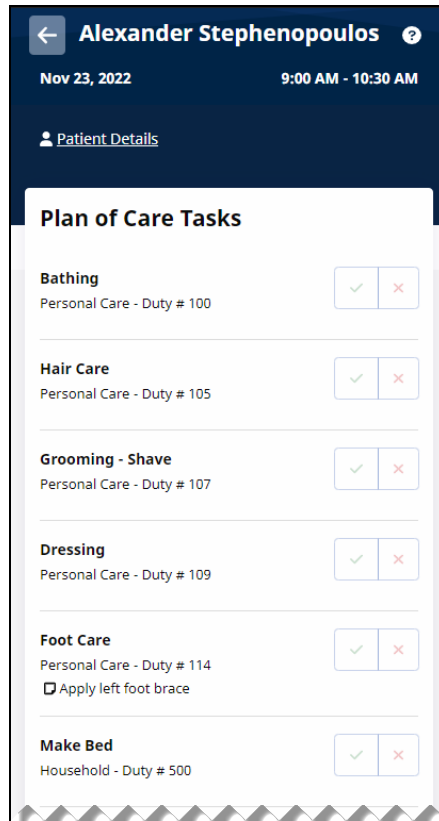
3. If configured by the Agency, on the Electronic Visit Verification page, select **GPS** or **Security Token** as the EVV method.
 - If you select **GPS**, after you allow the app access to your location, you can use the map to help locate the Patient Address, and (if configured by the Agency) you can change the **Service Delivery Location** from *Home* to another value to bypass the need for proximity to the Patient Address.
 - If you select **Security Token**, you are prompted to enter the six-digit **Device ID** and **Passcode**.
 - When you are finished, tap **Continue**.



Electronic Visit Verification

4. If required, obtain a **Patient Signature**, an **RN (Coordinator) Signature**, and a **Caregiver Signature**, and tap **Submit**, or tap **Skip** if available and select the reason for skipping.
5. If required, obtain **Patient Voice Consent (Record, Stop Recording)** and tap **Done**, or tap **Skip** if available, and select the reason for skipping.

The Visit Details page is displayed.

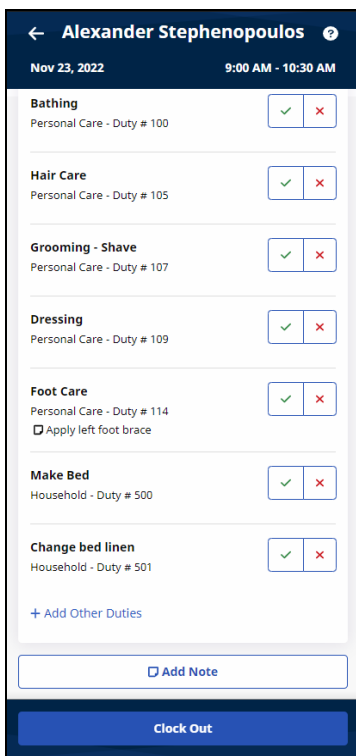


Scheduled Visit Details

To Clock Out for a Scheduled Visit:

1. If you have Non-EVV Services to record (and the Agency is configured to allow it), tap the checkmark to select **Non-EVV Services** and select the **Duration** of Non-EVV Services in *Hours* and *Minutes*.
2. If the Visit includes a Plan of Care (or Other Duties have been added), select the duties performed (checkmark) and duties refused (X). Select any required **Value** for duties performed and any **Refused Duty Reason** the Agency requires.

Tip: You can add other duties that the Agency has configured for the visit by tapping **+ Add Other Duties**.



Duties

3. If the Visit includes Care Insight Questions, answer all required questions, and provide **Additional Info** as needed. Tap **Save Responses**.

Care Insights Questions

All fields marked with an asterisk () are required.*

Patient generally requires more help *

Yes
 No
 Skip

Additional Info

Limit to 500 characters

Patient is quieter than usual

Yes
 No
 Skip

Any new marks or bruises *

Yes
 No
 Skip

Care Insights Questions

4. If you want to [add a note](#) about the visit, tap **Add Note**.
5. When you are finished, tap **Clock Out** at the bottom of the page.

← Alexander Stephenopoulos
?

Nov 23, 2022 9:00 AM - 10:30 AM

Hair Care ✓ ✕

Personal Care - Duty # 105

Grooming - Shave ✓ ✕

Personal Care - Duty # 107

Dressing ✓ ✕

Personal Care - Duty # 109

Foot Care ✓ ✕

Personal Care - Duty # 114

Apply left foot brace

Make Bed ✓ ✕

Household - Duty # 500

Change bed linen ✓ ✕

Household - Duty # 501

+ Add Other Duties

Add Note

Clock Out

Clock Out

6. If required, on the Electronic Visit Verification page, update **GPS** or **Security Token** settings and tap **Continue**.
7. If required, obtain **Patient Signature** and any other required signatures and tap **Submit**, or tap **Skip** if available and select the reason for skipping.

-
8. If required, obtain **Patient Voice Consent (Record, Stop Recording)** and tap **Done**, or tap **Skip** if available, and select the reason for skipping.

[Back to Visits - Clock In and Clock Out](#)

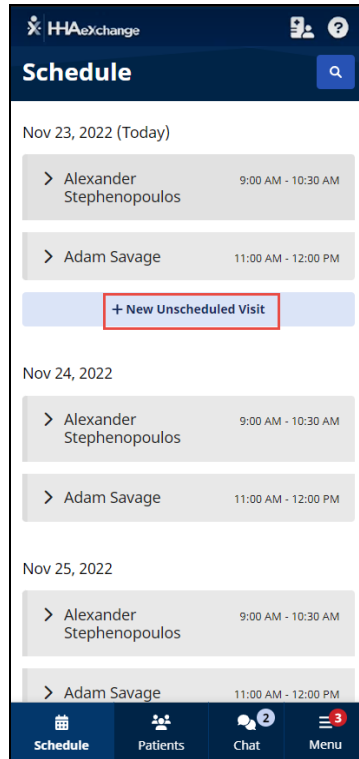
Unscheduled Visit

You can select **+ New *Unscheduled Visit*** from the *Schedule* page to create a new *Unscheduled Visit*. You can create an *Unscheduled Visit* for any Patient to whom you have access, whether or not you have previously worked with the Patient.

Note: A New (Unscheduled) Visit can also be created from the [Patients](#) Page.

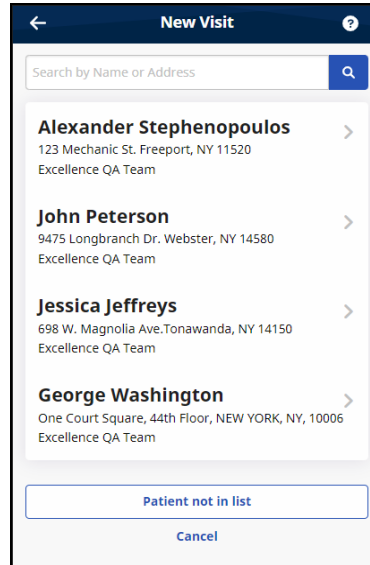
To create an *Unscheduled Visit* from the *Schedule* page:

1. Tap **+New *Unscheduled Visit***.



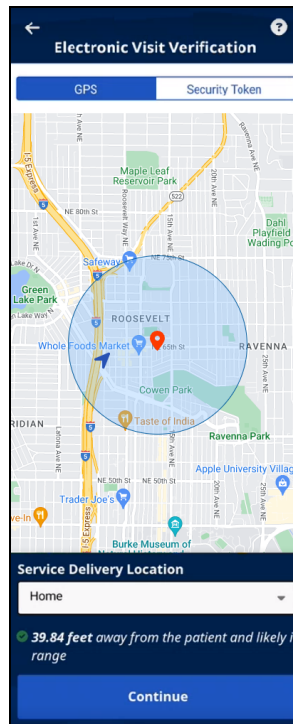
Unscheduled Visit

- On the *New Visit* page, select the patient, or use the Search function at the top of the page to look up and select a Patient. If a matching visit is already scheduled with the Patient, the Mobile App gives you the option of using that Scheduled Visit instead of this New Unscheduled Visit.



Select Patient

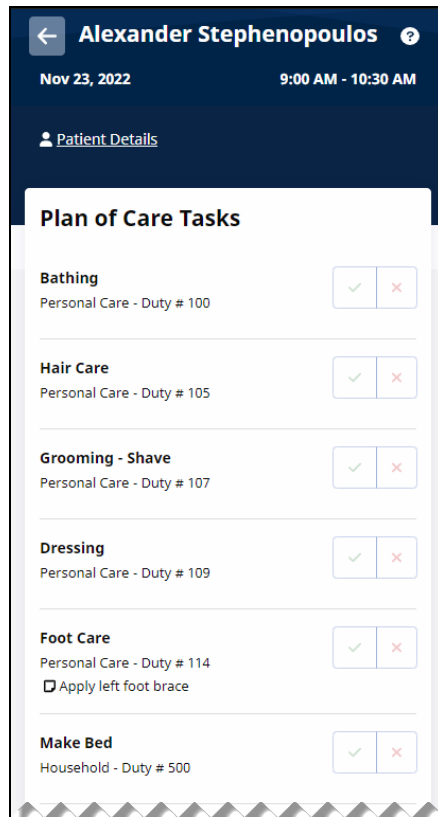
- If configured by the Agency, on the Electronic Visit Verification page, select **GPS** or **Security Token** as the EVV method.
 - If you select **GPS**, after you allow the app access to your location, you can use the map to help locate the Patient Address, and (if configured by the Agency) you can change the **Service Delivery Location** from *Home* to another value to bypass the need for proximity to the Patient Address.



EVV GPS page

- If you select **Security Token**, you are prompted to enter the six-digit **Device ID** and **Passcode**.
 - When you are finished, tap **Continue**.
4. If required, obtain a **Patient Signature**, an **RN (Coordinator) Signature**, and a **Caregiver Signature**, and tap **Submit**, or tap **Skip** if available and select the reason for skipping.
 5. If required, obtain **Patient Voice Consent (Record, Stop Recording)** and tap **Done**, or tap **Skip** if available, and select the reason for skipping.

The Visit Details page is displayed.

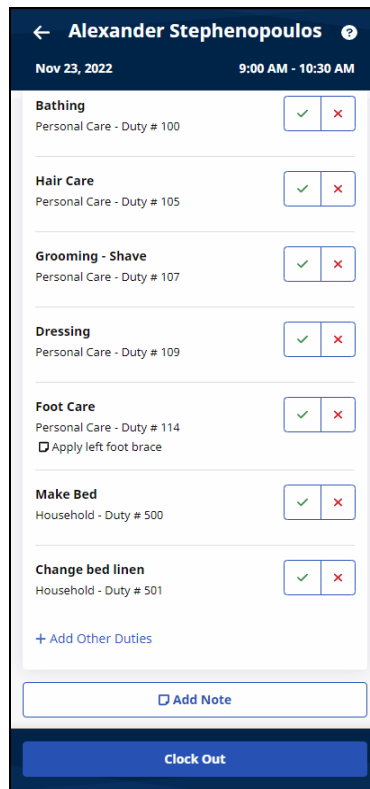


Visit Details

To Clock Out of an Unscheduled Visit:

1. If required, select a **Service Code** in *Visit Settings*.
2. If you have Non-EVV Services to record (and the Agency is configured to allow it), tap the checkmark to select **Non-EVV Services** and select the **Duration** of Non-EVV Services in *Hours* and *Minutes*.
3. If the Visit includes a Plan of Care (or Other Duties have been added), select the duties performed (checkmark) and duties refused (X). Select any required **Value** for duties performed and any **Refused Duty Reason** the Agency requires.

Tip: You can add other duties that the Agency has configured for the visit by tapping **+ Add Other Duties**.



Duties

4. If the Visit includes Care Insight Questions, answer all required questions, and provide **Additional Info** as needed. Tap **Save Responses**.

Care Insights Questions

All fields marked with an asterisk () are required.*

Patient generally requires more help *

Yes
 No
 Skip

Additional Info

Limit to 500 characters

Patient is quieter than usual

Yes
 No
 Skip

Any new marks or bruises *

Yes
 No
 Skip

Care Insights Questions

5. If you want to [add a note](#) about the visit, tap **Add Note**..
6. When you are finished, tap **Clock Out** at the bottom of the page.

← Alexander Stephenopoulos ?

Nov 23, 2022
9:00 AM - 10:30 AM

Hair Care ✓ ✗

Personal Care - Duty # 105

Grooming - Shave ✓ ✗

Personal Care - Duty # 107

Dressing ✓ ✗

Personal Care - Duty # 109

Foot Care ✓ ✗

Personal Care - Duty # 114

Apply left foot brace

Make Bed ✓ ✗

Household - Duty # 500

Change bed linen ✓ ✗

Household - Duty # 501

+ Add Other Duties

📄 Add Note

Clock Out

Clock Out

7. If required, on the Electronic Visit Verification page, update **GPS** or **Security Token** settings and tap **Continue**.
8. If required, obtain **Patient Signature** and any other required signatures and tap **Submit**, or tap **Skip** if available and select the reason for skipping.

-
9. If required, obtain **Patient Voice Consent (Record, Stop Recording)** and tap **Done**, or tap **Skip** if available, and select the reason for skipping.

[Back to Visits - Clock In and Clock Out](#)

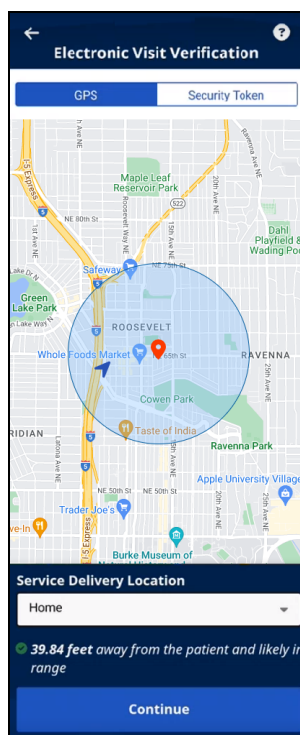
Consecutive Shifts

When enabled by the Agency, the *Consecutive Shifts* feature allows you to perform a single Clock-In and Clock-Out for multiple Consecutive Shifts for the same Patient or for one Consecutive Shift for two Linked Patients, such as a husband and wife receiving back-to-back services at the same address.

Consecutive Shifts for a Single Patient

To Clock In for a Single Patient Consecutive Shift (two or more shifts):

1. From the **Schedule** page, tap the shift for a single Patient with scheduled consecutive visits. Visit Details are displayed with the Start Time of the first shift and the End Time of the last shift.
2. Tap **Clock In** to begin the Consecutive Shift.
3. If configured by the Agency, on the Electronic Visit Verification page, select **GPS** or **Security Token** as the EVV method.
 - If you select **GPS**, after you allow the app access to your location, you can use the map to help locate the Patient Address, and (if configured by the Agency) you can change the **Service Delivery Location** from *Home* to another value to bypass the need for proximity to the Patient Address.



EVV GPS page

- If you select **Security Token**, you are prompted to enter the six-digit **Device ID** and **Passcode**.
 - When you are finished, tap **Continue**.
4. If required, obtain a **Patient Signature**, an **RN (Coordinator) Signature**, and a **Caregiver Signature**, and tap **Submit**, or tap **Skip** if available and select the reason for skipping.

5. If required, obtain **Patient Voice Consent (Record, Stop Recording)** and tap **Done**, or tap **Skip** if available, and select the reason for skipping.

When Clocked In, the Confirmed time (Start Time for the Consecutive Shift) is the Start Time of the first shift.

To Clock Out of a Single Patient Consecutive Shift (two or more shifts):

1. When the first shift's details are displayed, if you have Non-EVV Services to record (and the Agency is configured to allow it), tap the checkmark to select **Non-EVV Services** and select the **Duration** of Non-EVV Services in *Hours* and *Minutes*.
2. If a Plan of Care is included (or Other Duties have been added), select the duties performed (checkmark) and duties refused (X). Select any required **Value** for duties performed and any **Refused Duty Reason** the Agency requires.

Bathing Personal Care - Duty # 100	<input checked="" type="checkbox"/> <input type="checkbox"/>
Hair Care Personal Care - Duty # 105	<input checked="" type="checkbox"/> <input type="checkbox"/>
Grooming - Shave Personal Care - Duty # 107	<input checked="" type="checkbox"/> <input type="checkbox"/>
Dressing Personal Care - Duty # 109	<input checked="" type="checkbox"/> <input type="checkbox"/>
Foot Care Personal Care - Duty # 114 <input type="checkbox"/> Apply left foot brace	<input checked="" type="checkbox"/> <input type="checkbox"/>
Make Bed Household - Duty # 500	<input checked="" type="checkbox"/> <input type="checkbox"/>
Change bed linen Household - Duty # 501	<input checked="" type="checkbox"/> <input type="checkbox"/>
+ Add Other Duties	

Plan of Care Duties

Tip: You can add other duties that the Agency has configured for the visit by tapping **+ Add Other Duties**.

3. If the first shift includes Care Insight Questions, answer all required questions, and provide **Additional Info** as needed. Tap **Save Responses**.

Care Insights Questions

All fields marked with an asterisk (*) are required.

Patient generally requires more help *

Yes
 No
 Skip

Additional Info

Limit to 500 characters

Patient is quieter than usual

Yes
 No
 Skip

Any new marks or bruises *

Yes
 No
 Skip

Care Insights Questions

4. If you want to [add a note](#) about the first shift, tap **Add Note**.
5. When you are finished documenting the first shift, tap **Continue** at the bottom of the page to display the next consecutive shift's details.
6. When the next consecutive shift's details are displayed, complete the same steps (1-4) for that shift. When you finish documenting the last consecutive shift, tap **Clock Out** at the bottom of the page.
7. If required, on the Electronic Visit Verification page, update **GPS** or **Security Token** settings and tap **Continue**.
8. If required, obtain **Patient Signature** and any other required signatures and tap **Submit**, or tap **Skip** if available and select the reason for skipping.
9. If required, obtain **Patient Voice Consent (Record, Stop Recording)** and tap **Done**, or tap **Skip** if available, and select the reason for skipping.

After the Consecutive Shift is completed, the Consecutive Shift association is broken. You can only access each shift as an individual shift to make edits for the length of time after Clock Out allowed by the Agency. To make edits, return to the *Schedule* page, and select any shift in the Consecutive Shift sequence to apply updates to that specific shift by tapping **View/Edit Visit**.

Notes:

- If you Clock Out before the planned end of all shifts and don't Clock In for the remaining shifts, the remaining shifts are marked as Missed.
- If any shift in a Consecutive Shift sequence wasn't started, you can Clock In to that shift and complete it. If these are multiple shifts, they are treated as a new Consecutive Shift.
- Consecutive Shifts for a Single Patient and Consecutive Shifts for two Linked Patients cannot be co-mingled.
- Consecutive Shifts don't allow rounding at the contract level when there are multiple contracts with different rounding methods for the same Patient.

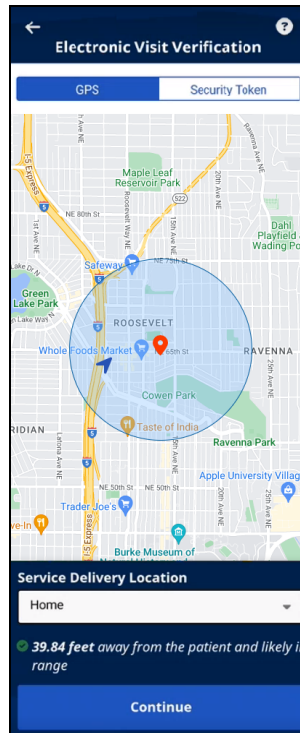
Consecutive Shifts for Linked Patients (Internal Contract)



Linked Patients are labeled as such on the *Schedule* page and are designated with a **chain link icon**.

To Clock In for a Linked Patients Consecutive Shift:

1. From the *Schedule* page, tap the first shift in the Linked Patient Consecutive Shift. Visit Details are displayed with the Start Time of the first shift and the End Time of the last shift. All Linked Patient names are listed.
2. Tap **Clock In** to begin the Consecutive Shift.
3. If configured by the Agency, on the Electronic Visit Verification page, select **GPS** or **Security Token** as the EVV method.
 - If you select **GPS**, after you allow the app access to your location, you can use the map to help locate the Patient Address, and (if configured by the Agency) you can change the **Service Delivery Location** from *Home* to another value to bypass the need for proximity to the Patient Address.



EVV GPS page

- If you select **Security Token**, you are prompted to enter the six-digit **Device ID** and **Passcode**.
 - When you are finished, tap **Continue**.
4. If required, obtain a **Patient Signature** for each of the linked patients, an **RN (Coordinator) Signature**, and a **Caregiver Signature**, and tap **Submit**, or tap **Skip** if available and select the reason for skipping.
 5. If required, obtain a **Patient Voice Consent (Record, Stop Recording)** for each of the linked patients and tap **Done**, or tap **Skip** if available, and select the reason for skipping.

When Clocked In, the Confirmed time is the Start time for the Consecutive Shift.

To Clock Out of a Linked Patients Consecutive Shift:

1. If you have Non-EVV Services to record (and the Agency is configured to allow it), tap the checkmark to select **Non-EVV Services** and select the **Duration** of Non-EVV Services in *Hours* and *Minutes*.
2. If the Visit includes a Plan of Care (or Other Duties have been added), select the duties performed (checkmark) and duties refused (X) *for the first linked patient*. Select any required **Value** for duties performed and any **Refused Duty Reason** the Agency requires.

Bathing Personal Care - Duty # 100	<input checked="" type="checkbox"/> <input type="checkbox"/>
Hair Care Personal Care - Duty # 105	<input checked="" type="checkbox"/> <input type="checkbox"/>
Grooming - Shave Personal Care - Duty # 107	<input checked="" type="checkbox"/> <input type="checkbox"/>
Dressing Personal Care - Duty # 109	<input checked="" type="checkbox"/> <input type="checkbox"/>
Foot Care Personal Care - Duty # 114 <input type="checkbox"/> Apply left foot brace	<input checked="" type="checkbox"/> <input type="checkbox"/>
Make Bed Household - Duty # 500	<input checked="" type="checkbox"/> <input type="checkbox"/>
Change bed linen Household - Duty # 501	<input checked="" type="checkbox"/> <input type="checkbox"/>
+ Add Other Duties	

Plan of Care Duties

Tip: You can add other duties that the Agency has configured for the visit by tapping **+ Add Other Duties**.

3. If the Visit includes Care Insight Questions, answer all required questions, and provide **Additional Info** as needed. Tap **Save Responses**.

Care Insights Questions

All fields marked with an asterisk () are required.*

Patient generally requires more help *

Yes No Skip

Additional Info

Limit to 500 characters

Patient is quieter than usual

Yes No Skip

Any new marks or bruises *

Yes No Skip

Care Insights Questions

4. If you want to [add a note](#) about the visit, tap **Add Note**.
5. When you are finished, tap **Continue** at the bottom of the page.
6. When the *next linked patient's visit* is displayed, complete the same steps (1-4) for that linked patient. When you finish documenting the visit for that linked patient, tap **Clock Out** at the bottom of the page.
7. If required, on the Electronic Visit Verification page, update **GPS** or **Security Token** settings and tap **Continue**.
8. If required, obtain a **Patient Signature** for each linked patient and any other required signatures and tap **Submit**, or tap **Skip** if available and select the reason for skipping.
9. If required, obtain a **Patient Voice Consent (Record, Stop Recording)** for each linked patient and tap **Done**, or tap **Skip** if available, and select the reason for skipping.

After the Consecutive Shift is completed, the Consecutive Shift association is broken. You can only access each shift as an individual shift to make edits for the length of time after Clock Out allowed by the Agency. To make edits, return to the *Schedule* page, and select any shift in the Consecutive Shift sequence to apply updates to that specific shift.

Notes:

- If you Clock Out before the planned end of all shifts in the sequence, the remaining shifts are marked as Missed.
- If the second shift in a two patient Linked Consecutive Shift sequence wasn't started, you can Clock In to the second shift to complete it.
- Consecutive Shifts for a Single Patient and Consecutive Shifts for two Linked Patients cannot be co-mingled.
- Consecutive Shifts don't allow rounding at the contract level when there are multiple contracts with different rounding methods for a Patient.
- Clock Out for the first shift and Clock In for the second are derived from the scheduled duration of the first shift. The Clock Out time recorded is used as the End time for the second shift.

[Back to Visits - Clock In and Clock Out](#)

Linked and Mutual Visits

Linked Patient Visits

Linked Patient Visits (when not handled as a [Consecutive Shift](#)) are treated as two individual shifts, each shift requiring Clock In and Clock Out.



Linked Patients are labeled as such on the *Schedule* page and are designated with a **chain link icon**.

1. *Clock In* for Linked Patient 1 as you would for any [Scheduled Visit](#).
2. Perform Linked Patient 1 Duties.
3. *Clock Out* for Linked Patient 1 as you would for any [Scheduled Visit](#).

When complete, the Mobile App reports a successful Clock Out for Linked Patient 1.

1. *Clock In* for Linked Patient 2 as you would for any [Scheduled Visit](#).
2. Perform Linked Patient 2 Duties.
3. *Clock Out* for Linked Patient 2 as you would for any [Scheduled Visit](#).

When complete, the Mobile App reports a successful Clock Out for Linked Patient 2.

Mutual Patient Visits

Mutual Patient Visits are treated as two separate patient visits handled at the same time, with Clock In and Clock Out performed from either of the two visits.



Mutual Patients are labeled as such on the Schedule page and are designated with a **two-person silhouette icon**.

1. Tap **Clock In** for a Mutual Patient Visit, and both patient visits indicate the same Clock In time.
2. If required for the first patient, enter Plan of Care (or Other Duties), answer Care Insight Questions, and then tap **Continue**.
3. If required for the second patient, enter Plan of Care (or Other Duties), answer Care Insight Questions, and then tap **Clock Out**.

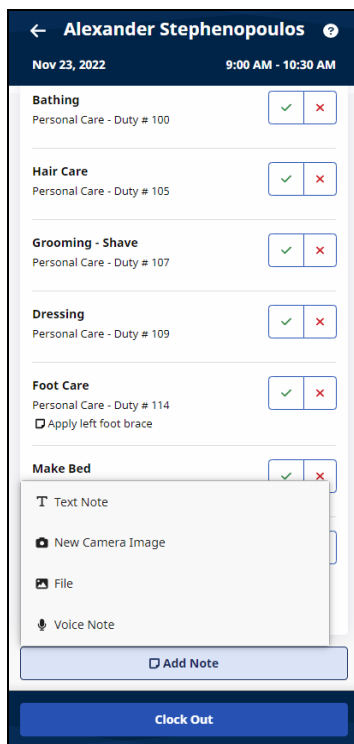
When you tap **Clock Out**, *both Visits are Clocked Out*.

[Back to Visits - Clock In and Clock Out](#)

Visit Notes

Follow these steps to enter a Visit Note.

1. From the bottom of the Visit Details page, tap **Add Note**.
2. Select the Note Type
 - **Text Note**- Up to 1000 characters.
 - **New Camera Image** - Opens the phone's camera, allowing you to take a photo and add a description up to 500 characters.
 - **File** - Opens a Search page where you can browse the phone for a file to attach.
 - **Voice Note** - Opens a recorder where you can record and save audio comments.
3. Obtain and attach the Note, and then tap **Save**.



Add Note

From the Visit Details page:

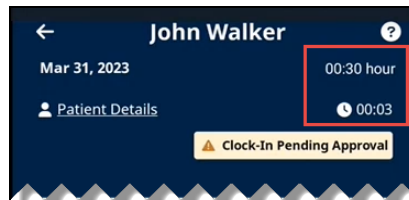
- To view an attached note, tap it.
- To edit an attached note, tap the **Edit** icon (pencil).
- To delete an attached note, tap the **Delete** icon (trash can).

Daily Variable Visit

When the Agency uses the *Daily Variable Schedule Type*, an amount of Visit Time is authorized per Day per Patient, but no specific daily Visit Hours are designated.

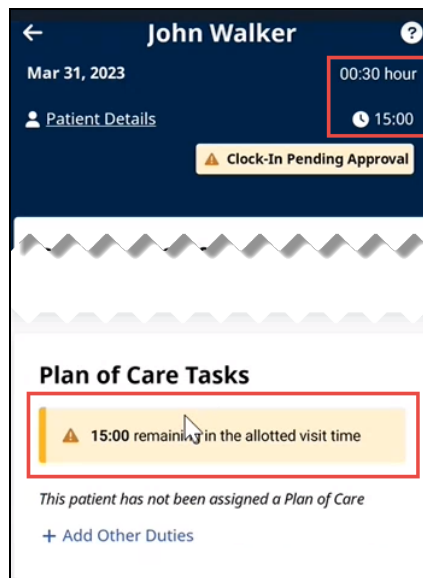
On the *Schedule* page, the authorized Visit Time is displayed next to the Patient name.

In *Visit Details*, the authorized Visit Time is displayed along with a clock tracking the Visit Time used.



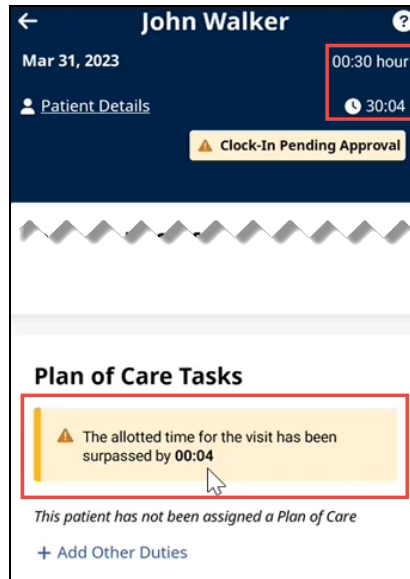
Daily Variable Visit Time in Visit Details

The Caregiver is alerted when 15 minutes of authorized Visit Time remains, and a countdown to the expiration of authorized Visit Time is displayed.



Daily Variable Visit 15 Minutes Remaining Alert

The Caregiver is alerted when the authorized Visit Time has been exceeded.



Daily Variable Visit Time Exceeded

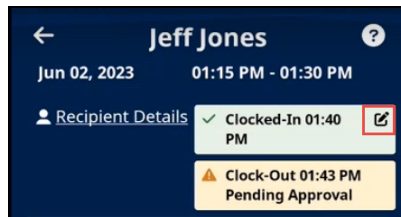
If the Caregiver does not end the Visit within the Agency's designated grace period (default of seven minutes), the Visit's EVV record is routed to the Agency's Call Dashboard for review and remediation.

Edit Visit Time

If configured by the Agency, you can edit the time of an EVV Visit that has already been completed.

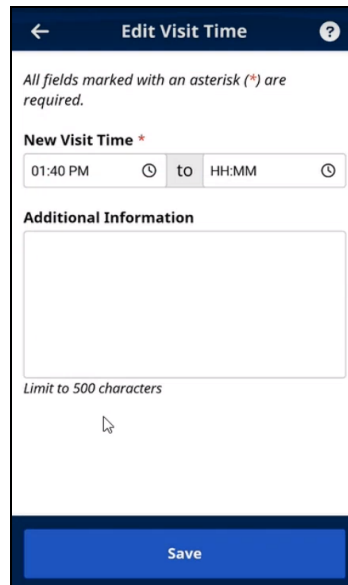
To edit Visit Time,

1. From the *Schedule* page, tap the completed Visit.
2. On the *Visit Details* page, tap the **Edit Visit Time** icon (pencil) on the Clock In message at upper right.



Tap Edit icon

3. On the *Edit Visit Time* page, select the From and To values for the **New Visit Time**.
4. When prompted, select a **Reason** for your change.
5. Provide **Additional Information** to explain your change.
6. When finished, tap **Save**.
7. If prompted, obtain a **Patient Signature**, and **Clock Out**.

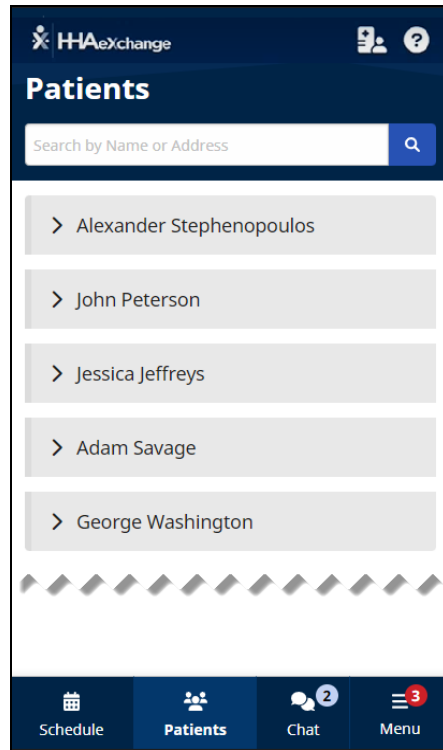


Edit Visit Time page

Your Time Edit is submitted to your Agency for approval.

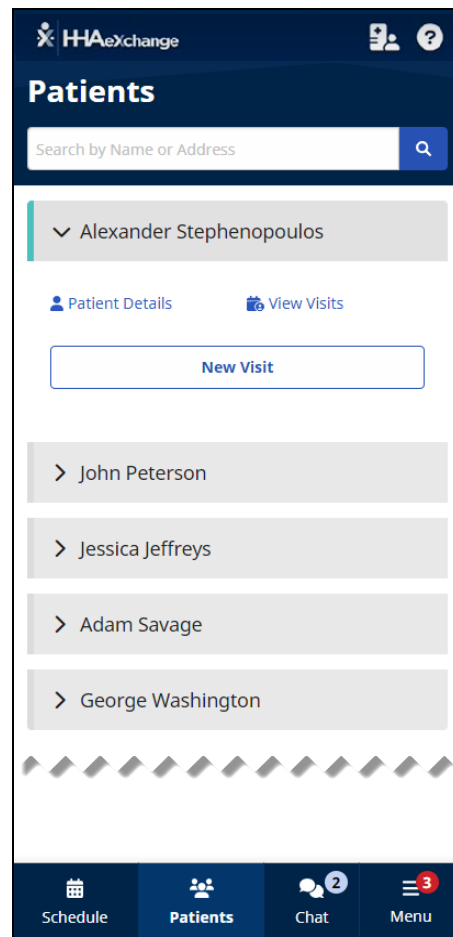
Patients

The *Patients* page lists Patients that you have visited in the past or are scheduled to visit.



Patients

Select a listed Patient, or type part of a Patient’s name and tap the **Search** icon (magnifying glass) to look up a Patient you are authorized to visit. When you select a Patient, you can view *Patient Details* and *View Visits*. If you are authorized, Patient Details may include *Clinical Info* and *Medications*.



Select a Patient

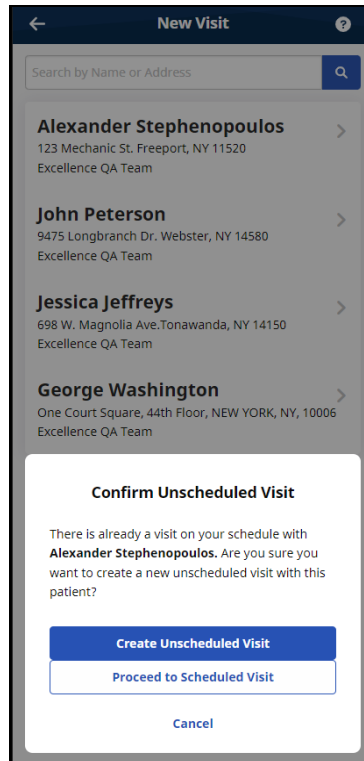
Patient Details include Patient Name, Admission ID, assigned Office, Phone Numbers, Addresses, Emergency Contacts, and, if configured, Clinical Information.

Visit Details (if configured) include Plan of Care Tasks, Care Insights Questions, [Add Note](#), and Medications.

You can select **New Visit** from the *Patients* page to create a new *Unscheduled Visit*. You can create an *Unscheduled Visit* for any Patient to whom you have access, whether or not you have previously worked with the Patient.

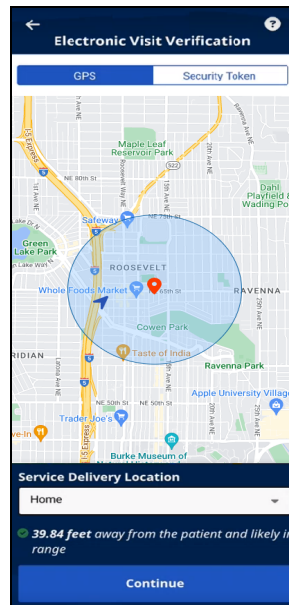
To create a New Visit from the *Patients* page:

1. Select the patient or use the Search function at the top of the page to look up and select a Patient.
2. Tap **New Visit**. If a matching visit is already scheduled with the Patient, the Mobile App gives you the option of using that Scheduled Visit instead of this New Visit.



Unscheduled Visit

3. If configured by the Agency, on the Electronic Visit Verification page, select **GPS** or **Security Token** as the EVV method.
 - If you select **GPS**, you can use the map to help locate the Patient Address, and (if configured by the Agency) you can set the **Service Delivery Location** to *Community* to bypass the need for proximity to the Patient Address.



EVV GPS page

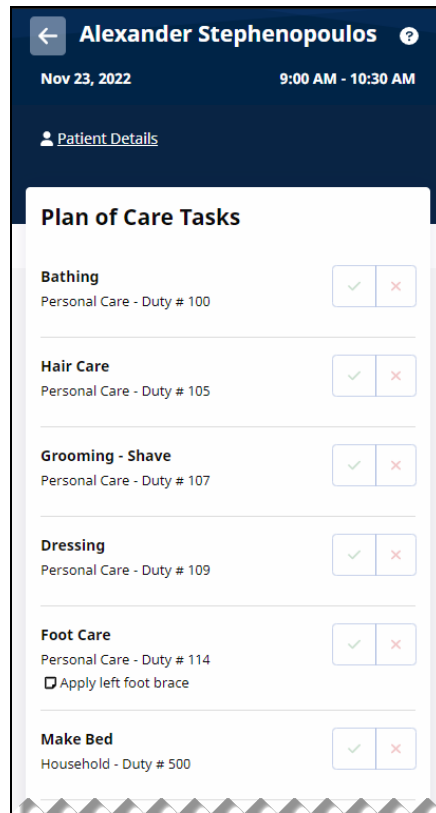
- If you select **Security Token**, you are prompted to enter the six-digit **Device ID** and **Passcode**.
 - When you are finished, tap **Continue**.
4. If required, obtain **Patient Signature** and tap **Submit**, or tap **Skip** if available, and select the reason for skipping.
 5. If required, obtain **Patient Voice Consent (Record, Stop Recording)** and tap **Done**, or tap **Skip** if available, and select the reason for skipping.

On the Visit Details page, you can view:

Schedule Time - Scheduled Start Time and End Time of Visit

Patient Details - Patient Name, Admission ID, assigned Office, Phone Numbers, Addresses, Emergency Contacts, and, if configured, Clinical Information

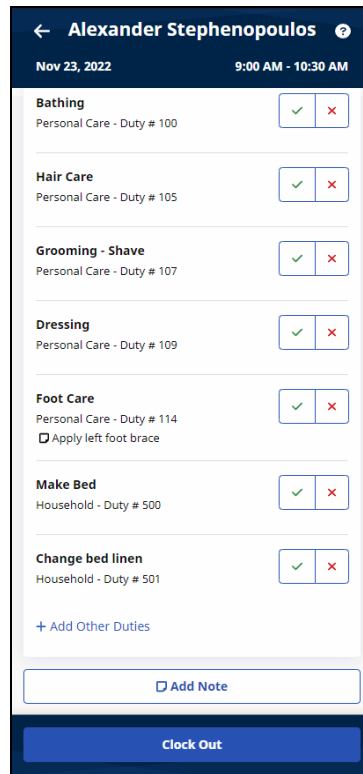
Visit Details - If configured, Plan of Care Tasks, Care Insights Questions, [Add Note](#), and, if configured, Medications



Unscheduled Visit Details

To Clock Out of a New Visit:

1. If required, select a **Service Code** in *Visit Settings*.
2. If you have Non-EVV Services to record (and the Agency is configured to allow it), tap the checkmark to select **Non-EVV Services** and select the **Duration** of Non-EVV Services in *Hours* and *Minutes*.
3. If the Visit includes a Plan of Care (or Other Duties have been added), select the duties performed (checkmark) and duties refused (X). Select any required **Value** for duties performed and any **Refused Duty Reason** the Agency requires.



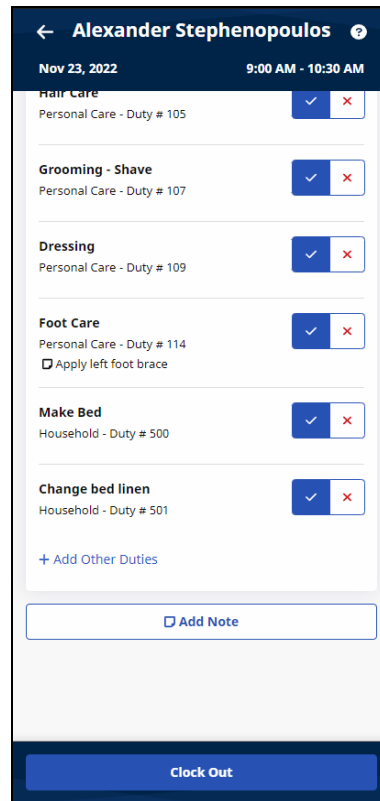
Duties

4. If the Visit includes Care Insight Questions, answer all required questions and provide **Additional Info** as needed. Tap **Save Responses**.



Care Insights Questions

5. If you want to [add a note](#) about the visit, tap **Add Note...**
6. When you are finished, tap **Clock Out** at the bottom of the page.



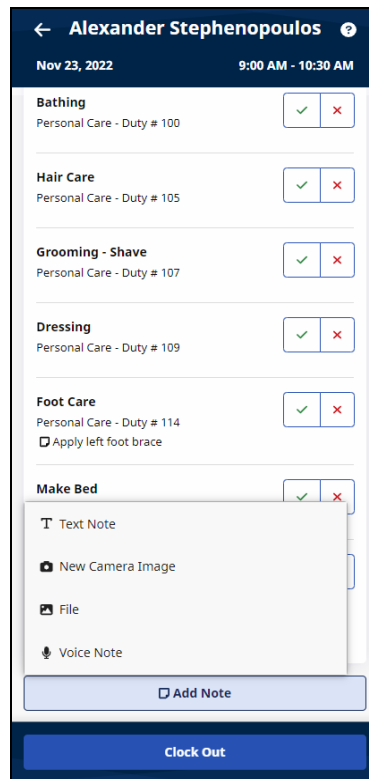
Clock Out

7. If required, obtain a **Patient Signature**, an **RN (Coordinator) Signature**, and a **Caregiver Signature**, and tap **Submit**, or tap **Skip** if available and select the reason for skipping.
8. If required, obtain **Patient Voice Consent (Record, Stop Recording)** and tap **Done**, or tap **Skip** if available, and select the reason for skipping.

Visit Notes

Follow these steps to enter a Visit Note.

1. From the bottom of the Visit Details page, tap **Add Note**.
2. Select the Note Type
 - **Text Note**- Up to 1000 characters.
 - **New Camera Image** - Opens the phone's camera, allowing you to take a photo and add a description up to 500 characters.
 - **File** - Opens a Search page where you can browse the phone for a file to attach.
 - **Voice Note** - Opens a recorder where you can record and save audio comments.
3. Obtain and attach the Note, and then tap **Save**.



Add Note

From the Visit Details page:

- To view an attached note, tap it.
- To edit an attached note, tap the **Edit** icon (pencil).
- To delete an attached note, tap the **Delete** icon (trash can).

Care Insights Questions

Care Insights Questions are Yes/No questions to the Caregiver that evaluate patient health. For example, “Is the patient eating less than usual?”

You may be prompted with *Care Insights* questions during Clock-Out (after entering Duties). You can answer *Care Insights* questions any time before (or after) Clock-Out by accessing *Visit Details* from the *Schedule* page. Answers can be reviewed and modified during Clock-Out.

Care Insights Questions

All fields marked with an asterisk (*) are required.

Patient generally requires more help *

Yes
 No
 Skip

Additional Info

Limit to 500 characters

Patient is quieter than usual

Yes
 No
 Skip

Any new marks or bruises *

Yes
 No
 Skip

Care Insights Questions

When the Patient is enrolled in *Care Insights*, you must answer **Yes**, **No**, or **Skip** to all required *Care Insights* questions (marked with a red asterisk) and save the responses before clocking out. If configured by the Agency, a required **Additional Info** text box may be displayed for an explanation of a response.

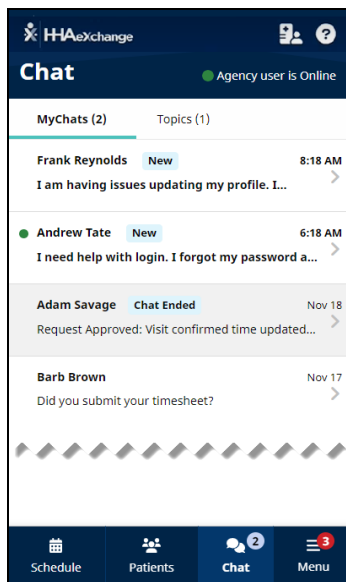
Note: If the mobile app is off-line when you clock out, *Care Insights* questions do not appear. If the mobile app goes off-line while you are answering *Care Insights* questions, answers cannot be saved and a warning is displayed.

After a Visit is complete, you can view and edit your responses by accessing *Visit Details* from the *Schedule* page up until the time the visit is billed.

Two-Way Mobile Chat

If configured by the Agency, the Chat function allows text-like communication between you and your Agency. After Agency configuration, you can see **Chat** on the Navigation Bar at the bottom of the *Menu* page with a bubble counter that indicates the number of chat sessions with one or more unread chats.

When you tap **Chat** from the **Navigation Bar** at the bottom of the page, the *MyChats* and optional *Topics* tabs are displayed.



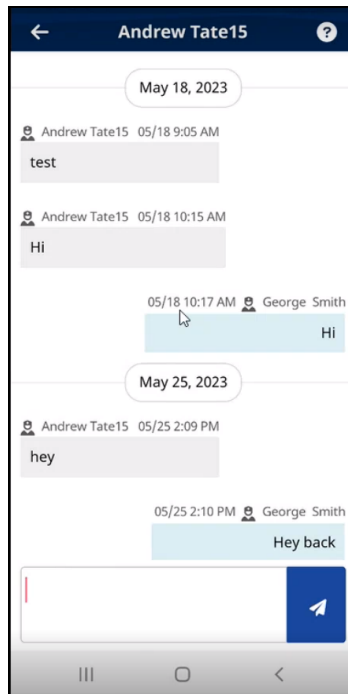
Chat

MyChats tab

If configured by the Agency, on the *MyChats* tab, you can see a list of one-on-one chats initiated by an Agency user. From *MyChats*, you can respond and continue conversations on those chat threads. You cannot initiate chats from the *MyChats* tab.

Unread messages are identified with a New icon. The most recent chat message is displayed at the top with a time stamp.

Tap any message to open the chat thread on the *MyChats* tab.



Sample Chat Thread

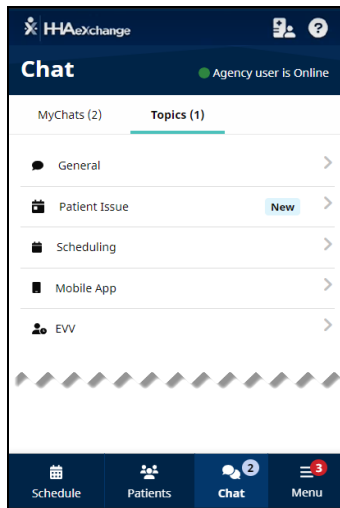
The Agency user's name displays in the header and Agency messages appear on the left. Your response messages appear on the right.

You can enter up to six lines of text and tap the **Send** (paper plane) icon to send the response message.

Topics tab

Topics are defined and activated by the Agency. If an Agency does not enable a Topic(s), the *Topics* tab does not display in the Mobile App.

On the *Topics* tab, you can initiate a chat pertaining to a selected topic such as **General**, **Patient Issue**, **EVV**, **Scheduling**, and **Mobile App**.



Topics tab

A bubble counter in the *Topics* tab header indicates unread chats within a Topic. When the *Topics* tab is selected, a list of available topics is displayed.

Unread messages are identified with a New icon. The most recent chat message is displayed at the top with a timestamp.

Tap a Topic to start a communication thread or to respond to an existing conversation.

In the chat, each entry is time-stamped to indicate when sent.

The Topic title appears in the page header. In the chat thread, the icon to the left of the chat message contains the initials of the Agency user, as there may be several users responding.

To send a Topics message, type the message in the text window and tap the **Send** (paper plane) icon.

Push Notifications

Push notifications allow you to be alerted that chat messages have been received when you are not logged into the Mobile App.

Tap the notification to open the Chat function.

Caregiver Compliance

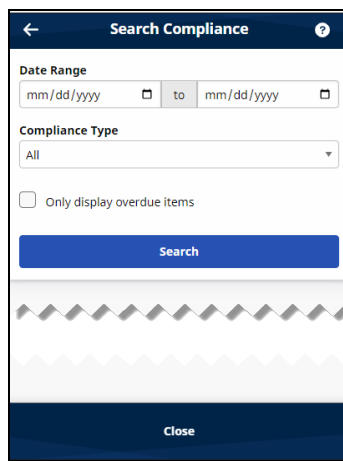
If configured by the Agency, the *Caregiver Compliance Alerts* feature displays your Caregiver Compliance status (based on Discipline) directly on the Mobile App, informing you of completed and upcoming medical and evaluation due dates.

The *Compliance* page is accessed from the *Menu* page. The bubble counter in red on the *Menu* page indicates the number of items needing attention.



Caregiver Compliance

Tap the **Search** icon (magnifying glass) to open a search for specific information. Select from available information such as **Compliance Type** or **Date Range**, or select **Only Display Past Due** to display only overdue items.

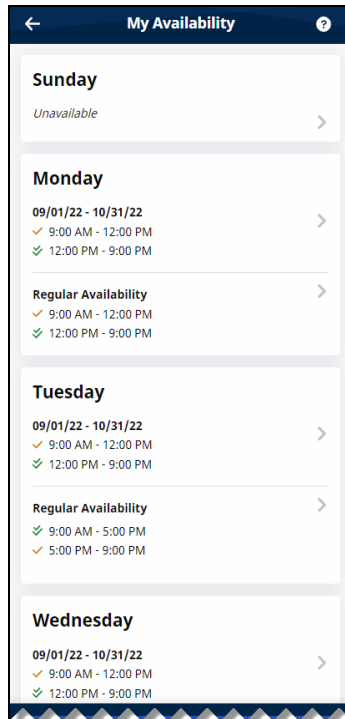


Search Compliance

My Availability

When enabled by the Agency, you can review your *Availability* preferences.

To review Availability, from the *Menu*, tap **My Availability**. The *My Availability* page displays your Regular Availability and Special Availability for the week. A double green checkmark designates preferred times. A single red checkmark designates possible but not preferred times.



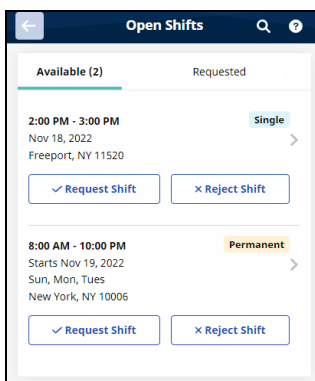
My Availability

Request an Open Shift

You can use the Open Shifts feature to review and request assignment to open shifts broadcast by the Agency/Office.

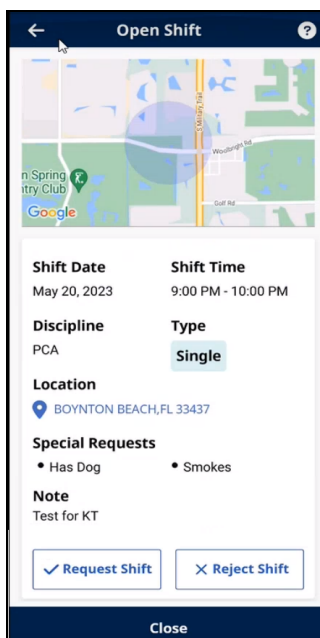
Follow the steps below to view and express interest in Open Shifts.

1. From the Menu, tap **Open Shifts** to view all broadcast shifts on the **New** tab of the *Open Shifts* page. Shifts are labeled as **Single** or **Permanent**.



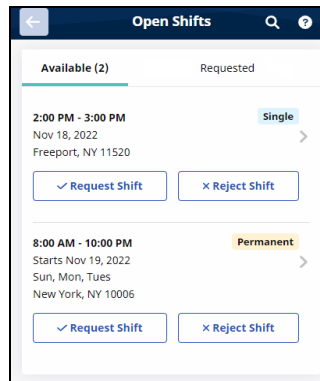
Open Shifts

2. Tap the shift itself to view details, including Date and Time, Required Discipline, Shift Type, Location, Special Requests, and Notes.



Shift Details

3. Tap **Close** to return to the Open Shifts page.



Open Shifts

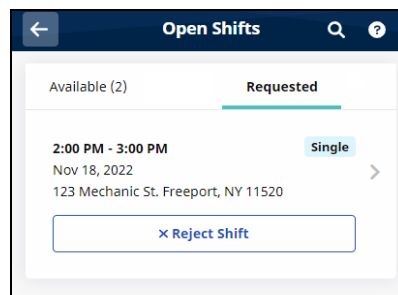
4. If interested in working the shift, tap **Request Shift**.

If you don't see a Shift that you want to request, tap the **Search** icon (magnifying glass) at the top of the page to search for a Shift by **Shift Type** and **Date Range**.

Note: To guard PHI (Protected Health Information), only the City, State, and Zip Code of the Patient Address are provided until the shift is assigned.

Indicating interest does not mean that you are automatically given a shift. Shifts must be assigned by the Agency's Coordinator. Only then does the shift appears as a scheduled Visit on the Mobile App.

Requested shifts move to the *Requested* tab until assigned by the Agency's Coordinator. When assigned to you, the shift moves to your *Schedule* page.

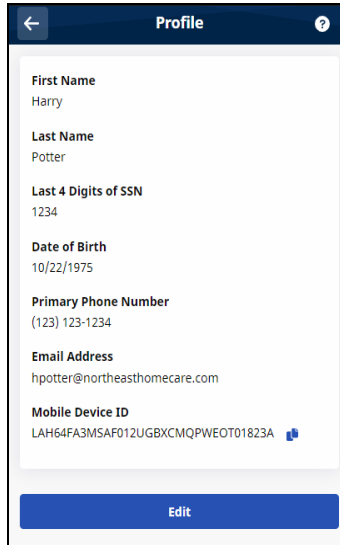


Requested Shift

If the Agency rejects the request, the shift is removed from the *Requested* tab.

Profile

To edit your Profile information, tap **Profile** from the *Settings & Help* section of the *Menu*.



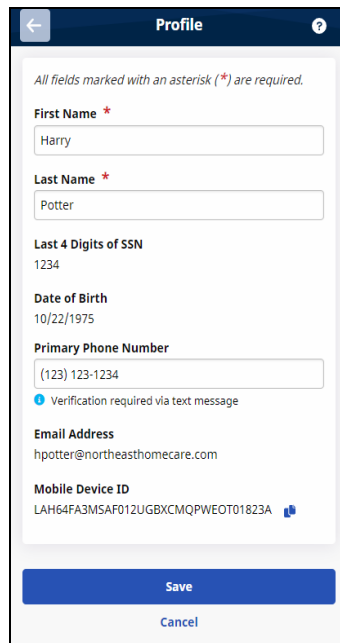
The screenshot shows the 'Profile' page with the following information:

- First Name:** Harry
- Last Name:** Potter
- Last 4 Digits of SSN:** 1234
- Date of Birth:** 10/22/1975
- Primary Phone Number:** (123) 123-1234
- Email Address:** hpotter@northeasthomecare.com
- Mobile Device ID:** LAH64FA3MSAF012UGBXCMPWEOT01823A

An 'Edit' button is located at the bottom of the page.

Profile

On the *Profile* page, tap **Edit**, make any changes, and then tap **Save**.



The screenshot shows the 'Edit Profile' page with the following information and input fields:

- First Name *** (input field): Harry
- Last Name *** (input field): Potter
- Last 4 Digits of SSN:** 1234
- Date of Birth:** 10/22/1975
- Primary Phone Number:** (123) 123-1234
- Verification required via text message
- Email Address:** hpotter@northeasthomecare.com
- Mobile Device ID:** LAH64FA3MSAF012UGBXCMPWEOT01823A

'Save' and 'Cancel' buttons are located at the bottom of the page.

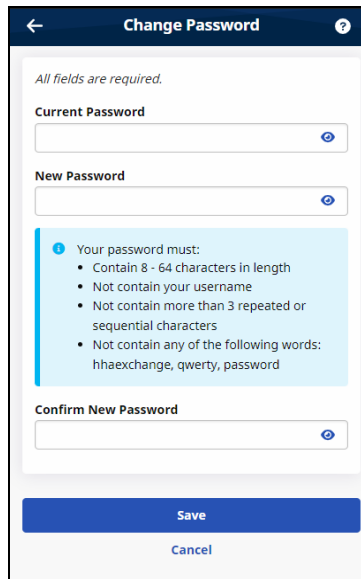
Edit Profile

Note: A confirmation text is sent to your phone when the **Primary Phone Number** is added or changed. You must respond to the confirmation text in order to use the phone number to reset a password.

Change Password

To change your Mobile App password,

1. From the *Menu*, tap **Change Password**.
2. On the *Change Password* page, type the **Current Password** and **New Password**. Type the new password again in **Confirm New Password**.
3. When finished, tap **Save** to change the password and return to the *Menu*.

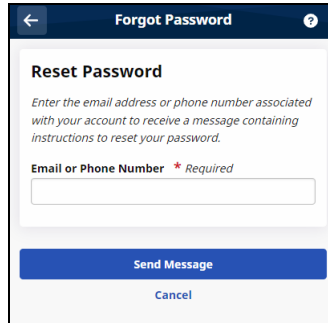


Change Password

Reset Password

To reset your Mobile App password,

1. From the *Login* page, tap **Forgot Password?**
2. On the *Forgot Password* page, type the **Email** or validated **Phone Number** associated with the account. Tap **Send Message**.



Forgot Password

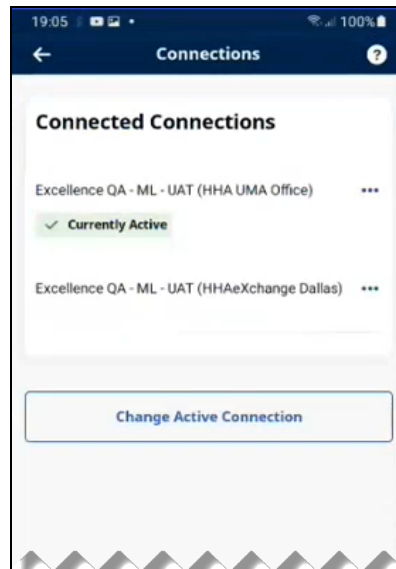
3. When the app confirms the message has been sent, tap **Done** to return to the *Login* page.
4. When you receive the reply message, follow its instructions to reset your password and log in.

Account Locked

After 10 failed login attempts, you are locked out of the Mobile App. A message advises you to use the **Forgot Password?** function (described above) to reset your password.

Connections

The Connections page is used to switch between Agencies/Offices connected to you, the Caregiver/Employee.

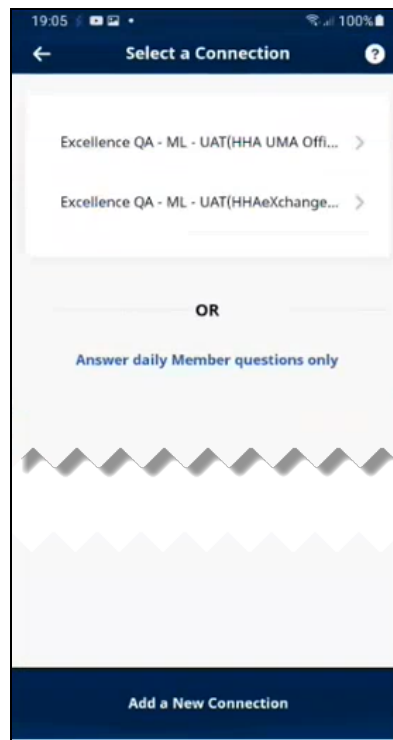


Connections page

To change Connections,

1. From the *Menu*, tap **Connections**.
2. On the *Connections* page, select from the list of **Connected Connections** and tap **Change Active Connection** to open the *Select a Connection* page.
3. Select the connection you want or choose to **Answer daily patient questions only**.

If configured, *Third-Party Terms* must be accepted. Then, the *Schedule* page (*Patients* page for Daily Patient Questions) is displayed.

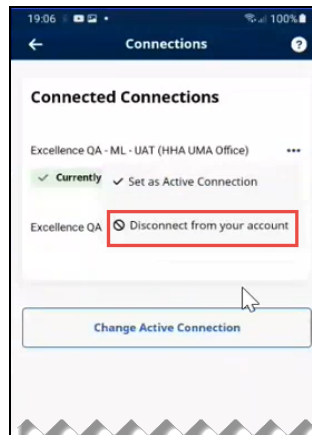


Select a Connection

If the Connection you want is not shown on the *Connections* page, tap **Connect with a New Connection**. On the *Connect a New Connection* page, enter the Connection's **Activation Code** and tap **Submit Code**. Finish Connection Account Setup as explained in the Sign Up Here help topic.

To disconnect a Connection from your account,

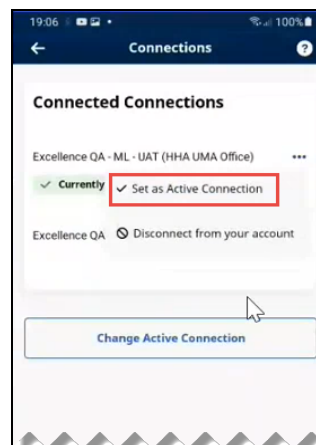
1. From the *Menu*, tap **Connections**.
2. On the *Connections* page, tap the ellipsis (...) next to the name of the Connection you want to disconnect.
3. Tap **Disconnect Connection from your account**.
4. When prompted to confirm your actions, tap **Disconnect Connection**.



Disconnect Connection

To set a Connection as the active connection for your account,

1. From the *Menu*, tap **Connections**.
2. On the *Connections* page, tap the ellipsis (...) next to the name of the Connection you want to set as the active connection.
3. Tap **Set as Active Connection**.



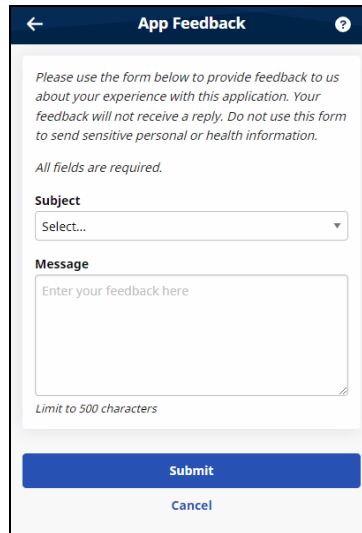
Set as Active Connection

App Feedback

You can use the App Feedback page to provide comments on the Mobile App to HHAX.

To provide feedback,

From the *Menu*, tap **App Feedback**.



App Feedback

On the *App Feedback* page, select a **Subject** that applies to your comment. In **Message**, type your comments (up to 500 characters) and tap **Submit**.

Note: Your feedback will not receive a reply.


Caution: *Do not* use this form to send sensitive personal or health information.

Available Subjects include:

- **Functionality Request** - Mobile App enhancement requests
- **General Feedback** - General comments
- **Issue/Bug** - Issues discovered while using the Mobile App
- **Translation Feedback** - Alternate language corrections needed

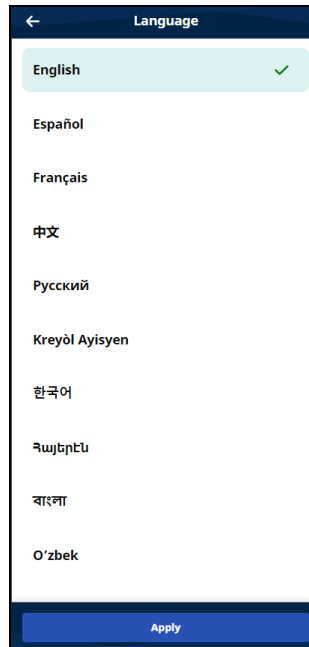
Select Language

The Mobile App offers language options designed to accommodate you with your preferred language when using their mobile device.

When logging in, if the Mobile App Log In page is displayed in an unfamiliar language, you can tap the **Language Selector** icon  at the bottom center of the *Log In* page to select a different language.

To change language settings from the *Menu*,

1. Tap **Select Language**.
2. From the list of available languages, select the new language. When selected, the displayed page is translated into the new language.
3. Tap **Apply** at bottom to save the language of choice.



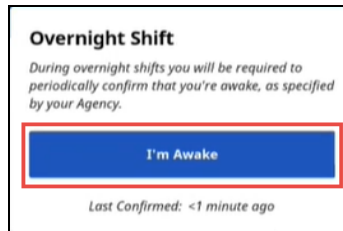
Language

A variety of languages are supported by the Mobile App. Tap **Select Language** from the *Menu* to see the most current list.

Note: Maps are displayed in the new language after the Mobile App is restarted.

I'm Awake Status

When *Enable the I'm Awake Button for Midnight Shifts* is selected by the Agency in the Enterprise application, Caregivers who work overnight shifts that include midnight (12:00 AM) are presented with an **I'm Awake** button after Clock-In. Tapping the button on a regular basis (designated for you by the Agency) proves to the Agency that you are awake and monitoring the Patient.



I'm Awake

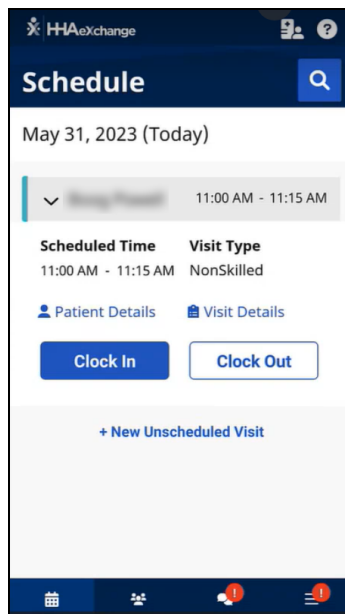
You must periodically check in by tapping **I'm Awake**.

When you tap **I'm Awake**, the Confirmed time is captured, and a *Last Confirmed* status timer (below the **I'm Awake** button) measures time elapsed since the last time you tapped **I'm Awake**.

Offline Mode

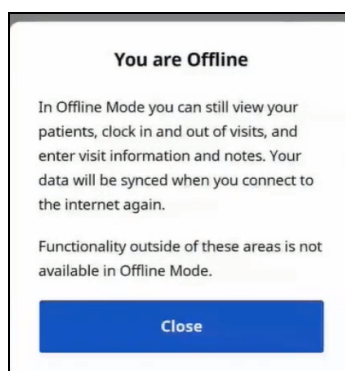
When *Offline Mode* is enabled by your Agency/Employer, you can use the Mobile App when there is no internet connectivity. When the internet connection is restored, the Mobile App automatically synchronizes with HHAX.

When in Offline Mode, you can Log In with the last used Email and Password, view your existing Patient-s/Consumers, Start and End Visits/Shifts, and view Help. Unavailable features in the Navigation Bar are marked with a white exclamation mark in a red circle.



Schedule page in Offline Mode

Selecting a feature or function that is unavailable offline results in a message explaining the limits of offline use.



Offline Message

Agency Configuration

The following Mobile App features and functions are configured by Agency/Office:

- Awake/Alert Status
- Caregiver Compliance
- Community Visits
- Consecutive Shifts
- Daily Variable Visits
- Electronic Visit Verification - GPS or Security Token
- My Availability
- Non-EVV Services
- Offline Functions
- Open Shifts
- Patient Signature Required
- Refused Duty Reason Required
- Skip Patient Signature Allowed
- Third-Party Terms
- Timesheets Required
- Two-Factor Authentication
- Two-Way Mobile Chat - Chat and Topics
- Visit Details - Plan Of Care, Value Based Care, Medications, Notes
- Visit Edit Tolerance Days

If you require one of these features or functions, the Agency must enable it. Contact the Agency for assistance.