# Caregiver Mobile App Process Guide (Providers) Caregiver Setup and Use



# **Document Revision History**

Date	Description of Revision		
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# **Overview**

The **HHAX Mobile App** is a tool used to place EVVs, review Patient and Visit information. The HHAX Mobile App is available for both iPhone and Android users. This process guide covers the Caregiver Mobile App functionality and setup in the HHAeXchange (HHAX) system as well as functionality on the Caregiver's device.

Please direct any questions, thoughts, or concerns regarding the content herein to <u>HHAeXchange</u> <u>Customer Support</u>. Refer to the **Help** section in the Mobile App for immediate questions or click the link to contact support for further assistance.

#### HHAX System Key Terms and Definitions

The following provides basic definition of HHAX System key terms applicable throughout the document.

Term	Definition		
Patient	Refers to the Member, Consumer, or Recipient. The Member 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 or organization coordinating services.		
Payer	Refers to the Managed Care Organization (MCO), Contract, or HHS. The Payer is the organization placing Patients with Providers.		
ННАХ	Acronym for HHAeXchange		

# **Caregiver Mobile App**

## **Downloading the App**

The HHAeXchange Mobile App is available for download through the App Store or Google Play. The App is available for both iPhone and Android devices. To locate and download the App, enter the keyword **HHA Exchange** in the search bar of the App Store or Google Play (illustrated in the image).

Caregivers are responsible for downloading and installing the application on their personal mobile device. Once registered, Caregivers must provide credentials as well as ID numbers to the Agency for further setup and linking to the HHAX system.



HHAeXchange Mobile App

## **Signing Up and Registering**

Creating an account for the Mobile App is a two-step process, as follows:

- 1. Sign up by creating login credentials.
- 2. **Register** by entering additional demographic information.

#### Sign Up

Once the App has downloaded, press **Sign Up** on the bottom left of the main screen. The App prompts for the following:

- An Email Address
- A **Password** (minimum of 8 letters, 1 capital, and 1 numeric value)

Once credentials are completed and confirmed, select **Sign Up** to log in to the App.

••••∘ Verizon 奈 Cancel	08:38 ø Sign Up	84% 💷
Email	@gmail.con	n
New Password	•••••	?
Confirm Password	•••••	
	Sign Up	

Sign Up Screen



Upon successfully creating an account, the system issues a verification email:



Successful Sign Up Email

#### Register

Follow the steps outlined below to register on the HHAX Mobile App.

Step	Action			
1	Log in to the App upon receiving the verification email.			
2	Review the Terms of User Agreement and select the Agree	button.		
3	The Main Screen opens. Click the <i>three-dot icon</i> (on the to message. Select the <b>Update Profile</b> option.	p-right corner) as prompted by the		
		Logout		
		Version: 1.1.14 Copyright 2013 HHAeXchange		



Step	Action	
4	Complete all the fields on the <b>Create Profile</b> page. Click the <b>Create</b> button to create the Profile.	•••⊙ Verizon
	<i>Note:</i> The values for <i>Last Name</i> , <i>Last 4 SSN</i> , <i>Gender</i> , and <i>Birthday</i> must match the information on record in HHAX. The Mobile App does not link correctly if any of these values does not match.	Last Name Last Name Last ASN ② Gender Gender Birthday MM/DD/YYYY Email jfranqui10@gmail.com Phone (xxx) xxx-xxxx Create
5	If all the information is entered correctly, a message appears containing the <b>Mobile ID</b> .	••••• Verizon *     09:16     9.93%     •       Cancel     Create Profile       ••••• Verizon *     09:16     9.93%       ••••• Verizon *     Create Profile       ••••• Verizon *     09:16     0       ••••• Verizon *     09:16     0       ••••• Verizon *     09:16     0       ••••• Verizon *     00:16     0       ••••• Verizon *     00:10     00:00       ••••• Verizon *     0K     0K

The HHAX system sends a second email after successful registration. This message contains the **Mobile ID** as well as instructions on how to log in and use the Mobile App:

Reply       Reply All       Forward         info@hhaexchange.com
Registration Successful
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.
Der Ishere Frenk
Dear Jonnny Frank
Your HHAeXchange Mobile App has been registered!
Complete these final step to link to your agency and start using the app!
1. Provide your unique Mobile ID #: 1043649 to your Agency
2. Open the HHAeXchange Mobile App.
3. Sign-In with the Username & Password that you entered during sign-up.
<ol> <li>Once your agency activates your Mobile App profile in their systems, you will see Patient and Visit information in your Mobile App!</li> </ol>
Note: If you work for more than one Agency using HHAeXchange, you can provide the same Mobile ID to each of them.
Thanks!
HHAeXchange

Successful Registration Email



# **Using the Mobile App**

### **The Main Screen**

Via the Mobile App Caregivers keep track of their schedule and Clock-IN and OUT of a Visit.

The following sections provide descriptions and guidance on the various options on the Main Screen.

127	HHAeXchange Angel Wings	0	:
Sche	Today's Schedule		
09	Visits scheduled for 02/09/2018		>
0	Visits not scheduled on Calendar		>
<b>4</b> E	Visits List of scheduled and confirmed visits		>
<u>6</u> 2	Patients List of serviced patients		>
	The Main Screen		

## Top Panel (1)

Clicking on the icon on the top panel to switch between Agencies/Offices the Caregiver is connected to. The Caregiver must provide every Agency/Office the **Mobile ID** for proper syncing/linking with the system.



Switch Offices

#### Today's Schedule (2)

**Today's Schedule** is used to review and Clock In and Out of scheduled Visits for the present day.



**Today's Schedule** 



#### **Unscheduled Visits (3)**

**Unscheduled Visits** allows Caregivers to submit EVV for unscheduled Visits. Caregivers create an unscheduled Visit for any Patient for which they have access to by selecting the Patient Profile.

Select **Patient not in the list** to create a new Visit if asked to provide service for a Patient a Caregiver has never worked with before.

EVV for an Unscheduled Visit generated via the **Patient not in the list** selection is automatically sent to **Call Maintenance** with the status "Unscheduled – Patient not Selected"; EVV cannot be linked because EVV is meant to provide proof to the Agency/Office that Caregivers were with the Patient.



**Note:** Placing EVV and logging POCs for Unscheduled Visits follows the same process as Scheduled Visits.

## Visits (4)

Select **Visits** to review all scheduled Visits up to two weeks in advance.



**Completed and Scheduled Visits** 



#### Patients (5)

Select **Patients** to view a list of all the Patients the Caregiver has access to. Select a Patient to view Patient Info and Visits.

••••• Verizon	হ 10:46	🥶 78% 💷
<b>〈</b> Back	Patient Details Harriet McBride	0
Clinical	Medications	
TYLENOL		
Dose:	325 MG	
Route:	ORAL	
<b>F</b>	Daily	

Multiple Addresses appear in the Patient Infor tab if/as entered

in the Patient Profile page (as illustrated in the image).

••••• Verizon LTI	E 11:28 Patient Details	@ <b>1 0</b> 67% 💷		
K Back Harriet McBride				
	Patient Info	Visits		
ŀ	arriet McBrid	e		
Northeast Hom	ecare Services (Lo	ong Island City)		
Home Pho	ne: 212-990-1010			
Phone	2: 212-339-9921			
Phone	3:			
Addre	SS: LONG ISLAND	CITY,NY,11101		
Cross-Street:				
Emergency C	ontacts			
Drake McBrid	le			
Phone	<b>1:</b> 212-333-3344			
Phone 2:				
Address: 50 West 29th Street				
Lives With Patient: No				
Has keys: Yes				

#### **Patient Details: Info**

<b>く</b> ₿₿	ick	Visit Detail Andrew Tate	<b>?</b> 🕀		
		Patient Info			
	Andrew Ian Tate (Default Office)				
	Phone 1: 173-213-1231				
	Phone 2: 327-234-2353				
	Phone 3: 347-345-3453				
	Address 1:	28 W Flagler St., S FL, 33130	Guite 802, MIAMI,		
	Address 2:	29 W Flagler St., S FL, 33130	uite 902, MIAMI,		
	Address 3:	30 W Flagler St., S FL, 33130	uite 1002, MIAMI,		
Emergency Contacts					

Patient Multi-Address



# **Clocking IN and OUT**

This section provides the steps involved when Clocking IN and OUT of a Visit, as well as entering POC Duties.

Step	Action	
1	Select <b>Today's Schedule</b> from the Main Screen. Select the appropriate Visit. For example, <b>Beth Gillroot</b> .	Werizon LTE         10:59         Image: Total of the state of the s
2	Upon selecting the Patient, the Clock-In/Out tab of the Visit Details page opens. Click on the <i>Clock In</i> button.	Image: Sector of the sector of th
3	Select either <b>GPS</b> or <b>Security Token</b> to submit an EVV. <i>Note: The term Security Token refers to the FOB Device.</i>	•••••• Verizon LTE

# The Provider System



Action				
A successful EVV (now grey), as illu <b>Note:</b> Unsuccessfu green.	displays in g ustrated in tl I EVV placeme	Action reen under the <i>Clock In</i> button ne image. ent times display in red instead of	Verizon LTE 09:58 1 0 85%   Back Visit Detail Beth Gillroot Image: Clock In/Out Directions   Clock In/Out Directions   03/24 at 10:00 03/24 at 10:15   Clock In Clock Out   03/24 at 10:05 Clock Out   03/24 at 10:05 Clock Out   03/24 at 10:16 Clock Out   03/24 at 10:0 03/24 at 10:15   Clock In Clock Out   03/24 at 10:16 Clock Out   03/24 at 10:17 Clock Out   03/24 at 10:19 Clock Out   03/24 at 10:19 Clock Out   03/24 at 10:19 Clock Out	
Successful EVV From the Visit Detail page, Caregivers can also access the following:				
Options (Tab) Descr		Descriptio	1	
Direct	<i>ions</i> tab	Syncs to the mobile device's GPS to p Visit location.	rovide directions to the	
Patien	<i>t Info</i> tab	Displays the Patient's name, any phototection the profile, their address, and emerged	ne numbers connected to ency contacts.	
Care	P <i>lan</i> tab	This page contains the Patient's POC describing how often it is required ald instructions.	listing each duty in detail, ong with additional	
When the Visit is button on the <i>Cla</i> of Care (POC), th performed. Select the <b>green</b> the <b>red</b> circle (x) In addition, select uses (requires) th refused. <i>Note:</i> When service separate POC dutie	completed, ock In/Out pa e Caregiver i circle (check for duties re to the <b>Refuse</b> the functiona <i>ing Mutual Pa</i> <i>ing Mutual Pa</i>	click the green Clock Out age. If the Visit included a Plan s prompted to select the duties mark) for duties performed or fused. <b>d Duty Reason</b> if the Agency ity when a duty is marked tients, the Caregiver must enter tient.	Image: Select       Image: Select         103 - Cooking       Select         Refused Duty Reason       Select         I03 - Cooking       Image: Select         Refused Duty Reason       Select         I04 - Cleaning       Service Performed by Panily         I04 - Cleaning       Service Not Scheduled for         Tother Tasks:       Ervice Not Scheduled for         Service Performed by Eanily       Service Not Scheduled for         Tother Tasks:       Service Not Scheduled for	
	A successful EVV (now grey), as illu Note: Unsuccessfu green. From the Visit Def Optio Direct Patien Care I When the Visit is button on the Cla of Care (POC), th performed. Select the green the red circle (x) In addition, select uses (requires) th refused. Note: When service separate POC dutie	A successful EVV displays in g (now grey), as illustrated in the <b>Note:</b> Unsuccessful EVV placement green. From the Visit Detail page, Can Options (Tab) Directions tab Patient Info tab Care Plan tab When the Visit is completed, button on the Clock In/Out part of Care (POC), the Caregiver i performed. Select the green circle (check the red circle (x) for duties results In addition, select the Refuse uses (requires) the functional refused. Note: When servicing Mutual Part separate POC duties for each Part	Action A successful EVV displays in green under the <i>Clock In</i> button (now grey), as illustrated in the image. Note: Unsuccessful EVV placement times display in red instead of green. From the Visit Detail page, Caregivers can also access the followin Options (Tab) Description Directions tab Syncs to the mobile device's GPS to p Visit location. Patient Info tab Displays the Patient's name, any phor the profile, their address, and emerged This page contains the Patient's POC describing how often it is required alco instructions. When the Visit is completed, click the green Clock Out button on the Clock In/Out page. If the Visit included a Plan of Care (POC), the Caregiver is prompted to select the duties performed. Select the green circle (checkmark) for duties performed or the red circle (x) for duties refused. In addition, select the Refused Duty Reason if the Agency uses (requires) the functionality when a duty is marked refused. Note: When servicing Mutual Patients, the Caregiver must enter separate POC duties for each Patient.	



Step	Action	
7	<ul> <li>Click <i>Save</i> once the required screens are completed. Doing so routes the user back to the <i>Visit Details</i> page with a confirmation message (as shown in the image).</li> <li>Click <i>OK</i> to return to the home screen.</li> </ul>	Visit Detail Beth Gillroot       Image: Construction of the constr



# **Additional Features**

#### **Settings and User Agreement**

On the Main screen, select the Settings icon (3-dots) to access additional features such as: password change, see which Agencies/Offices are linked to the Mobile Device ID, unlink from an Agency/Office, and review User Agreement terms.





**Settings Menu** 

14:14

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#### **User Guide**

Click the **Help** icon (orange question mark) to access the Mobile App user guide at any time.



 Visits: Selecting this will allow you to search all current and previous

Help Guide



#### **Patient Search**

Caregivers can search for Patients they have access to or have previously provided service for.



**Patient Search** 

#### Language Options

The Mobile App offers language options designed to accommodate Caregivers with their preferred language when using their mobile device. The following table provides instructions on how to change language settings.





Step	Action	
2	A list of flag icons appears indicating the various language options available:	Change Language 3
	<ul> <li>English (North America)</li> <li>Spanish (Latin America)</li> <li>French (European)</li> <li>Chinese (Traditional)</li> <li>Russian</li> <li>Haitian Creole</li> <li>Korean</li> </ul>	
	Select the preferred language option and click the <b>Apply</b> button.	
	<i>Note:</i> Other languages may be added in future releases. Scroll to locate other language (for example, English) on the device.	C C Apply
		Select Language
3	Upon selecting the preferred language option, all menu items appear in the chosen language. In this case, Spanish was the selected language.	HHAeXchange (2) : Homic (4) (18) Weite recommende age 01/18/2018
	<b>Note:</b> To see Map functionality displayed in the selected language, users must first change the language, then <u>restart</u> the application to view those changes.	Wista no programada         Visitas no programadas en el calendario         Visitas         Visitas         Pacientes         Lista de visitas programadas y confermadas         Pacientes         Lista de visitas programadas         Mensajes         Mensajes
		Language Applied