Caregiver Mobile App Process Guide (Providers)

Caregiver Setup and Use

Document Revision History

Date	Description of Revision
11/29/2018	Initial version of the document

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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 HHAeXchange Customer Support. 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.
HHAX	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.
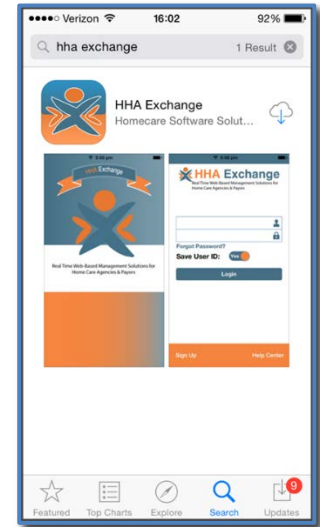
HHAeXchange Mobile App

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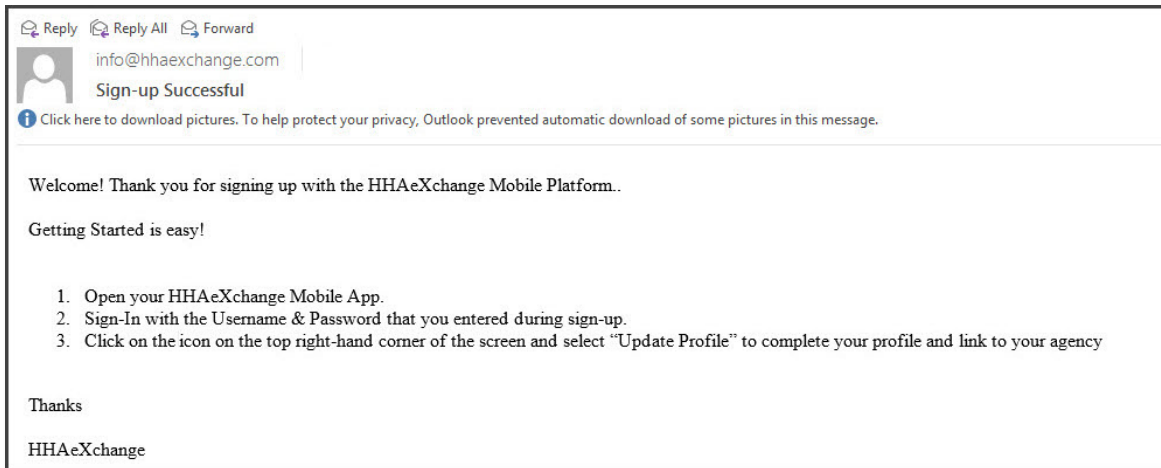
- An **Email Address**
- A **Password** (minimum of 8 letters, 1 capital, and 1 numeric value)

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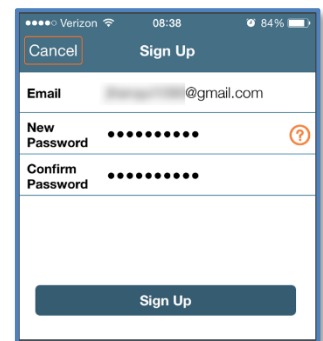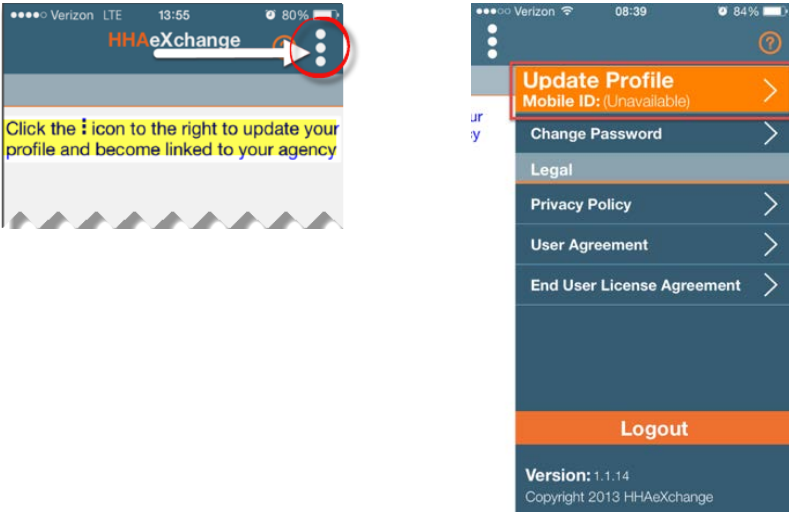
Sign Up Screen

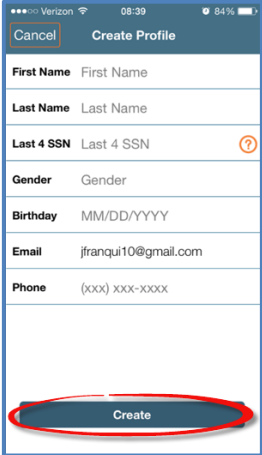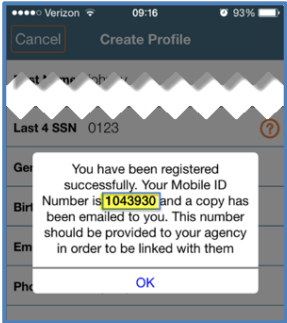Upon successfully creating an account, the system issues a verification email:


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 ***three-dot icon*** (on the top-right corner) as prompted by the message. Select the **Update Profile** option.

Step	Action	
4	Complete all the fields on the **Create Profile** page. Click the ***Create*** button to create the Profile. *Note: The values for **Last Name**, **Last 4 SSN**, **Gender**, and **Birthday** must match the information on record in HHAX. The Mobile App does not link correctly if any of these values does not match.*	
5	If all the information is entered correctly, a message appears containing the **Mobile ID**.	

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:
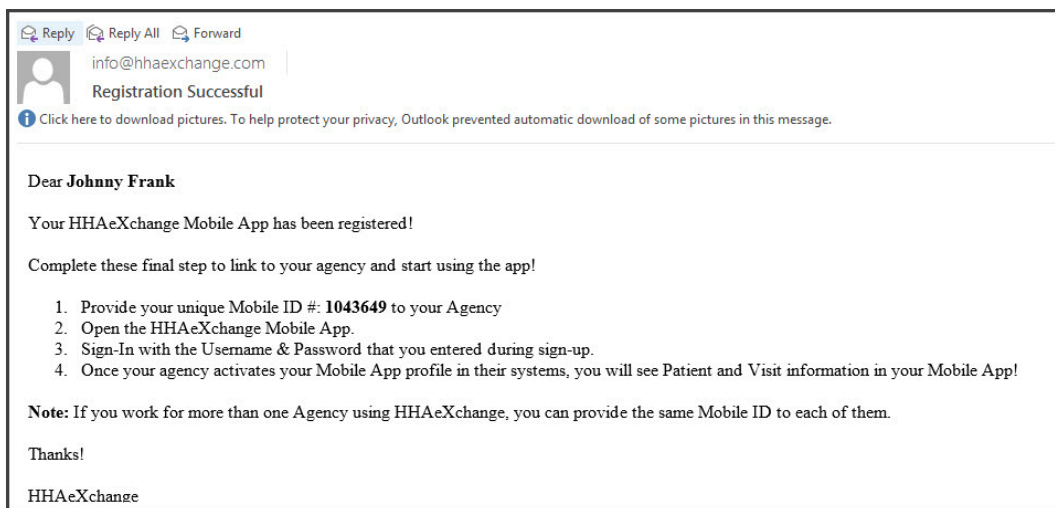
Successful Registration Email

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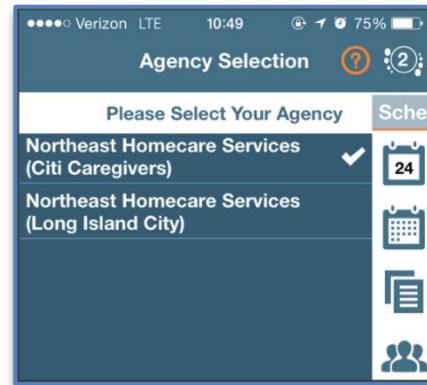
The following sections provide descriptions and guidance on the various options on the Main Screen.
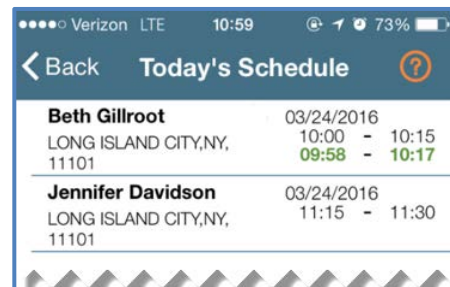

The Main Screen

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.
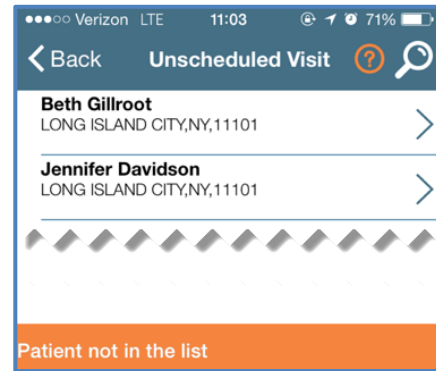
Create Unscheduled Visits

Note: Placing EVV and logging POCs for Unscheduled Visits follows the same process as Scheduled Visits.
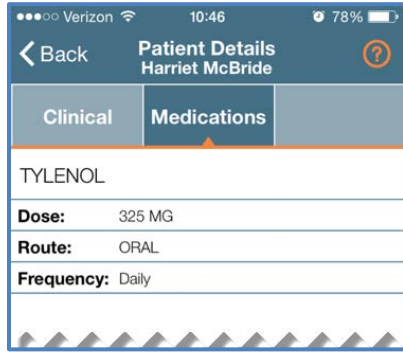
Visits (4)

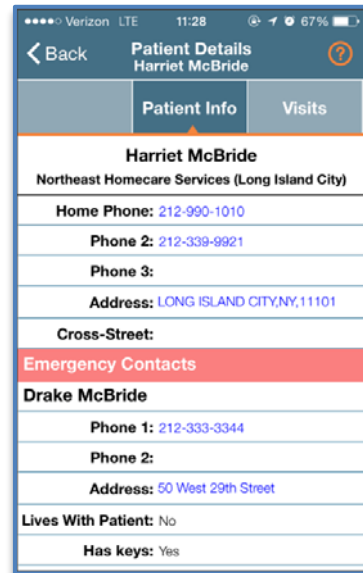Select **Visits** to review all scheduled Visits up to two weeks in advance.
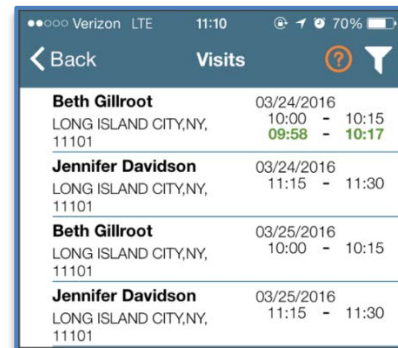
Completed and Scheduled Visits

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.
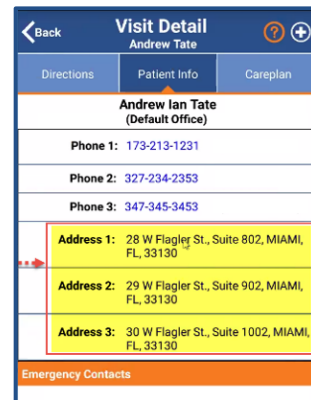

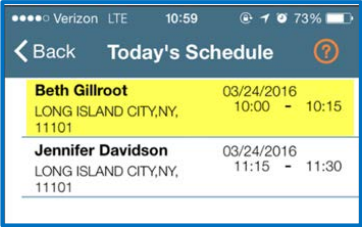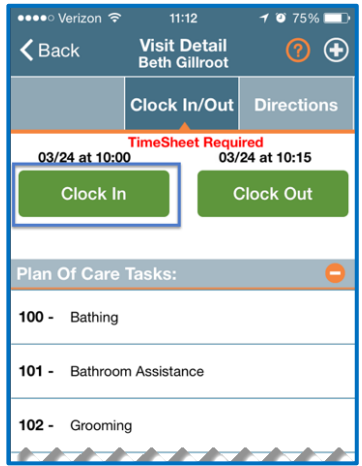**Patient Details: Medicaitons**

Patient Details: Info
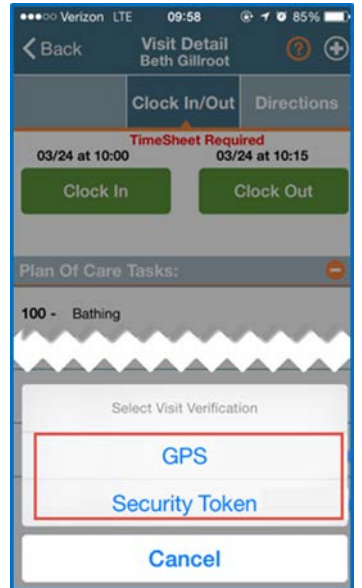
Multiple Addresses appear in the Patient Infor tab if/as entered in the Patient Profile page (as illustrated in the image).
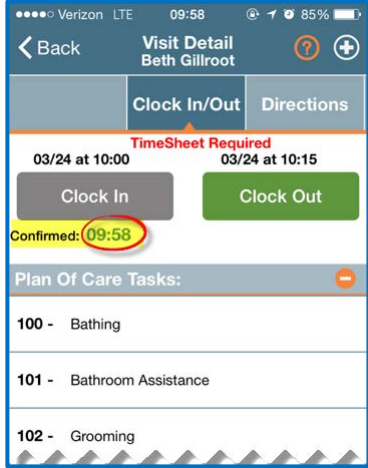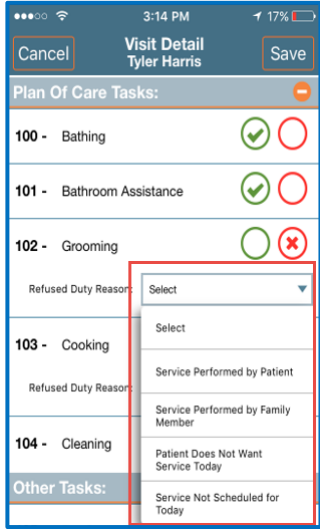

Patient Multi-Address

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 **Today's Schedule** from the Main Screen. Select the appropriate Visit. For example, **Beth Gillroot**.	
2	Upon selecting the Patient, the Clock-In/Out tab of the Visit Details page opens. Click on the ***Clock In*** button.	**Clock In/Out Tab**
3	Select either **GPS** or **Security Token** to submit an EVV. ***Note:*** *The term Security Token refers to the FOB Device.*	

Step	Action
4	A successful EVV displays in green under the *Clock In* button (now grey), as illustrated in the image. *Note: Unsuccessful EVV placement times display in red instead of green.* **Successful EVV**
5	From the **Visit Detail** page, Caregivers can also access the following:

Options (Tab)	Description
Directions tab	Syncs to the mobile device's GPS to provide directions to the Visit location.
Patient Info tab	Displays the Patient's name, any phone numbers connected to the profile, their address, and emergency contacts.
Care Plan tab	This page contains the Patient's POC listing each duty in detail, describing how often it is required along with additional instructions.

Step	Action
6	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.* **Enter POC Duties**

Step	Action
7	Click **Save** once the required screens are completed. Doing so routes the user back to the **Visit Details** page with a confirmation message (as shown in the image). Click **OK** to return to the home screen. **Clock Out Confirmation**

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.
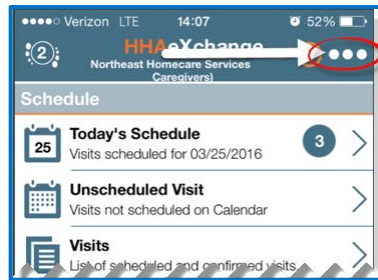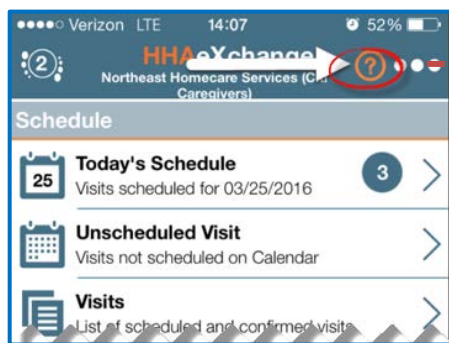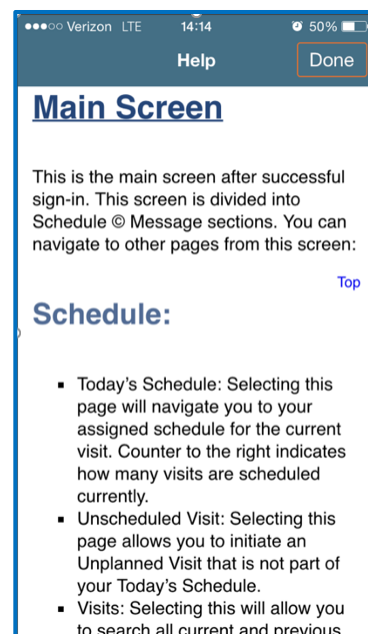

Settings Icon on the Main Screen

Settings Menu

User Guide

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

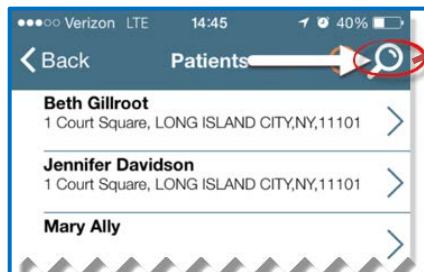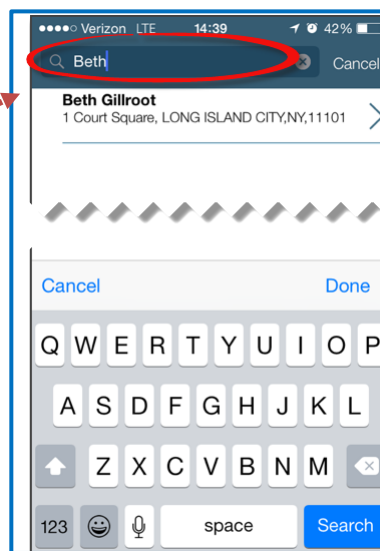**Settings Icon on the Main Screen**

Help Guide

Patient Search

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

On the **Patients** page, click the Search icon (magnifying glass) to open the search bar prompting the entry of either a Patient's Name or their Address.

Search Icon on the Patient Page

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
1	Click on the **Options** icon on the top-right, as illustrated in the image. From the list of options, select **Change Language**. **Options** **Change Language Option**

Step	Action
2	A list of flag icons appears indicating the various language options available: • English (North America) • Russian • Spanish (Latin America) • Haitian Creole • French (European) • Korean • Chinese (Traditional) Select the preferred language option and click the **Apply** button. *Note: Other languages may be added in future releases. Scroll to locate other language (for example, English) on the device.* **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. *Note: 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.* **Language Applied**