

HHAeXchange

# Mobile App Process Guide

Caregiver Setup and Use

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## Caregiver Mobile App

The HHAeXchange Mobile App, available for both the iPhone and Android, is a tool which may be used to place EVVs, review patient and visit information, and manage availability. This guide will cover the setup of the Mobile App from the Caregiver's end as well as basic functionality.

For further information, please refer to the **Help** section in the Mobile App or contact HHAeXchange customer support at [support@hhaexchange.com](mailto:support@hhaexchange.com)

### Downloading the App

The HHAeXchange Mobile App is available for download through the App Store or Google Play. Caregivers are responsible for downloading and installing the application on their personal mobile device. They must then provide their credentials, along with additional information generated when creating an account, to the Agency to properly link the App with the HHAeXchange system.

To locate and download the App, please enter the keyword **HHA Exchange** in the search bar of the App Store or Google Play. Caregivers should see the following screen on the App Store:



**HHAeXchange Mobile App**

## Signing Up and Registering

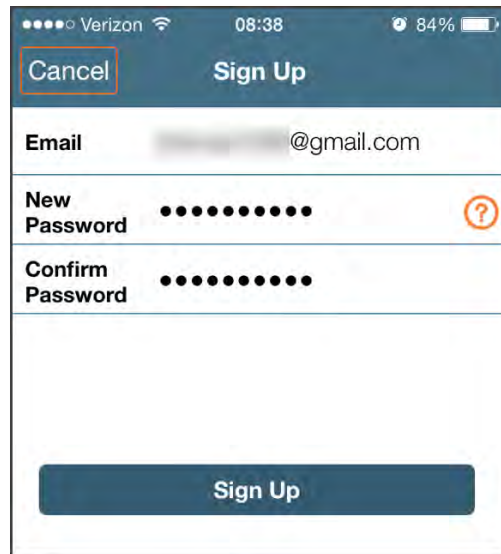
Creating an account for the Mobile App is a two-step process. You must:

1. **Sign up** by creating log in credentials.
2. **Register** by entering additional demographic information.

### Sign Up

Once you have downloaded the App, press **Sign Up** on the bottom left of the main screen. The App will prompt you for:

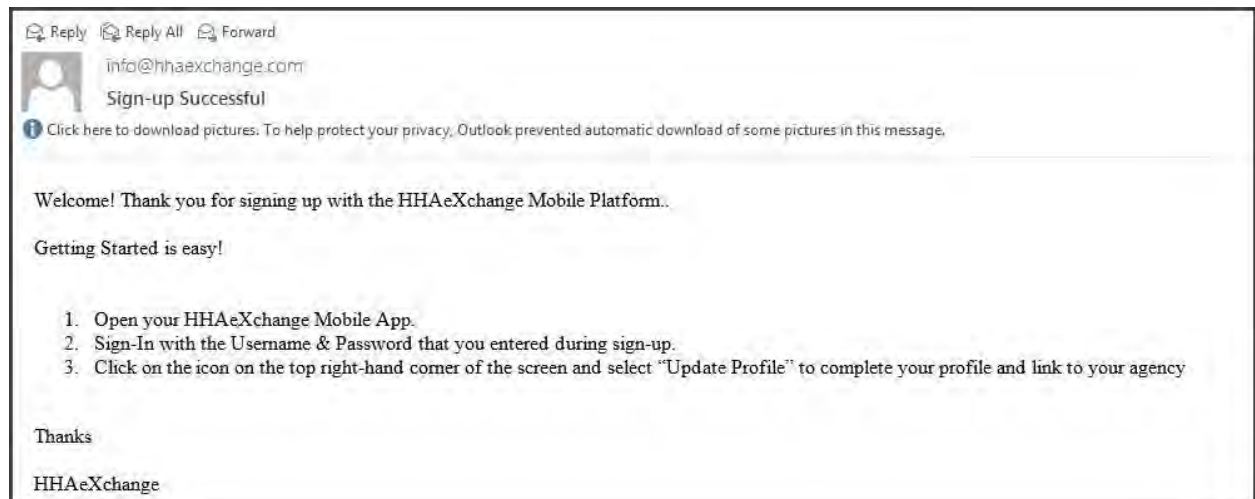
- Your Email Address
- A Password (minimum of 8 letters, 1 capital, and 1 numeric value)



Sign Up Screen

Select [Sign Up] once you have entered your email and confirmed your password. These will serve as your log in credentials going forward.

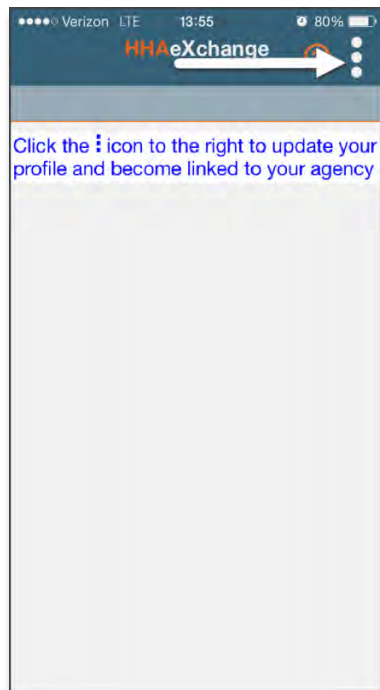
When you successfully create an account, you will receive a verification email:



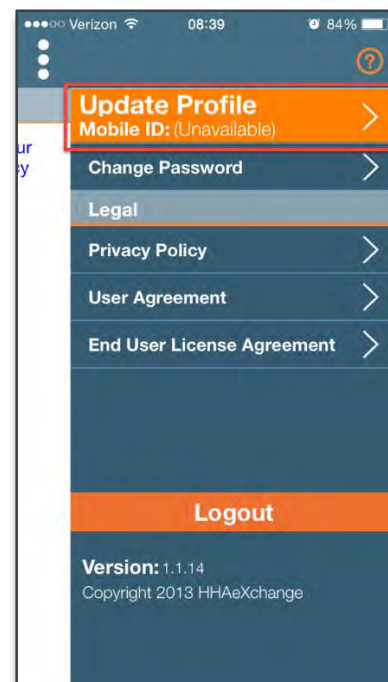
Successful Sign Up Email

## Register

After receiving the verification email, log into the App. Review the Terms of User Agreement, and after selecting the Agree button, you will be brought to the Main Screen, which will display a message prompting you to click the 3 dot icon in the upper right hand corner. Click the icon and select **Update Profile**.

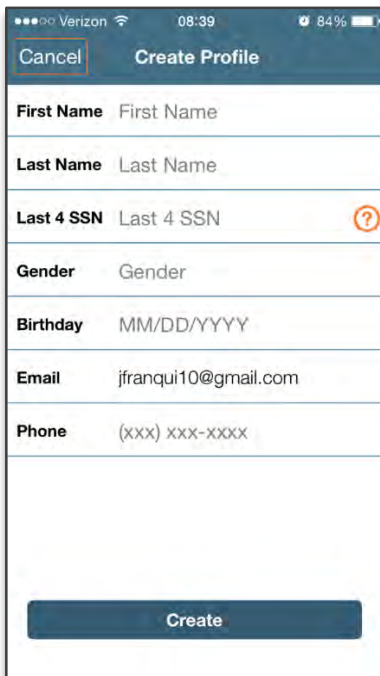


**Step 1: Click the 3 dot Icon**

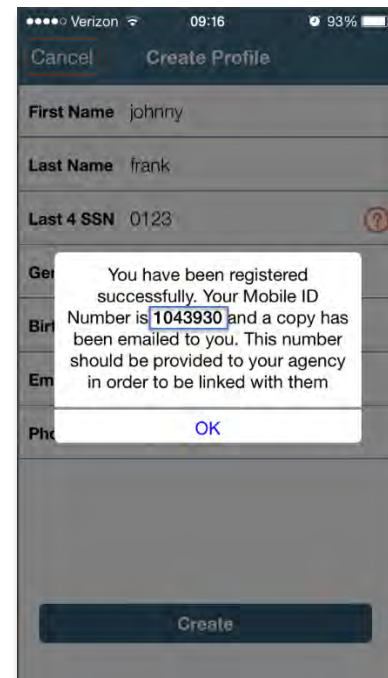


**Step 2: Select Update Profile**

Complete all the fields on the **Create Profile** page and click the [Create] button. If all the information has been entered correctly, a message will appear containing your **Mobile ID**:



**Step 3: Complete all the Fields**

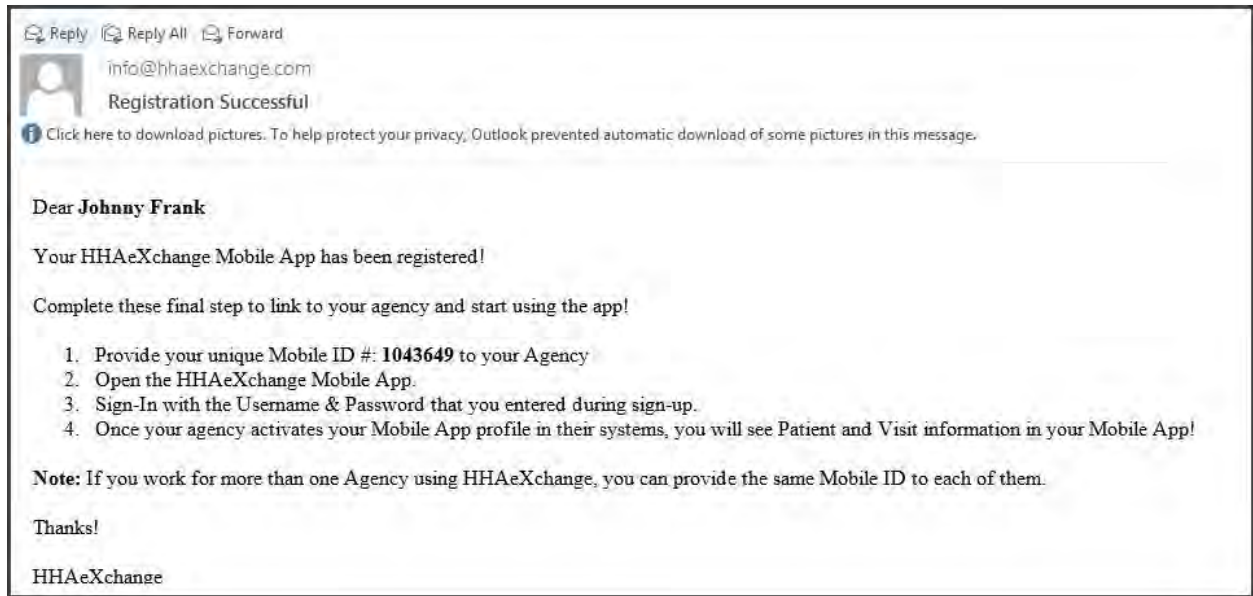


**Step 4: Provided your Mobile ID to your Agency**



**Note:** The values for **Last Name, Last 4 SSN, Gender, and Birthday** must match the information on record in HHAeXchange. If one of these values does not match, the Mobile App will not link correctly.

The HHAeXchange system will send a second email after successful registration. This one will contain your Mobile ID as well as instructions on how to log in and begin using the Mobile App:

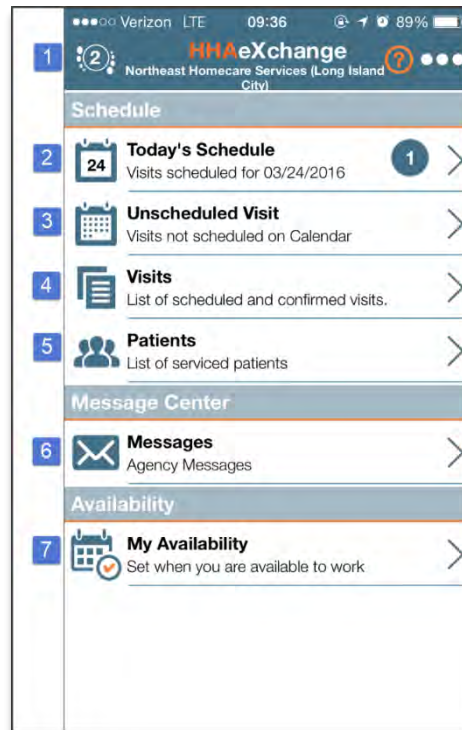


**Successful Registration Email**

# Using the Mobile App

## The Main Screen

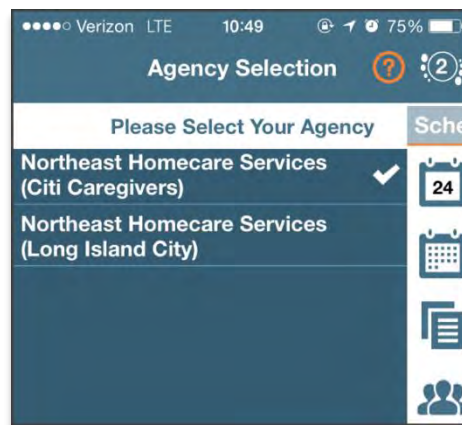
The Mobile App allows Caregivers to keep track of their schedule, receive and respond to messages from their Office/Agency, and Clock In and Out of a Visit.



The Main Screen

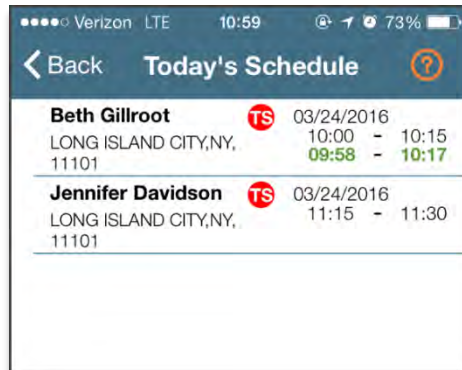
The functions available from the Main Screen are as follows:

1. The icon at the top of the page allows you to switch between any Agencies/Offices you are connected to. You must provide every Agency/Office you work for with your **Mobile ID** in order to sync with their system.



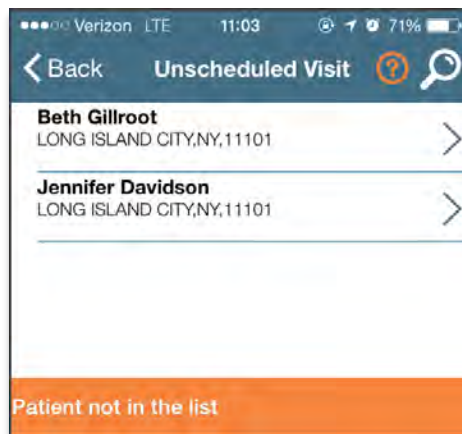
Switch Offices

2. **Today's Schedule:** This function is used to review, and Clock In/Out of, scheduled Visits for the present day.



**Today's Schedule**

3. **Unscheduled Visits:** This function allows you to submit EVV for unscheduled Visits. You may create an unscheduled Visit for any Patient you have access to by selecting their profile:



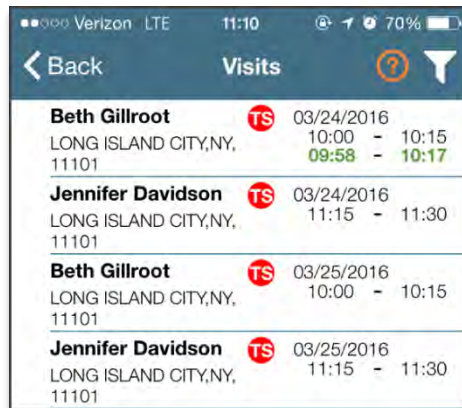
**Create Unscheduled Visits**

If you are asked to provide service for a Patient you have never worked with before, you can select **Patient not in the list** to create a new Visit. Visits created using this function cannot be verified using EVV; they are meant to provide proof to the Agency/Office that you were with the Patient.

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

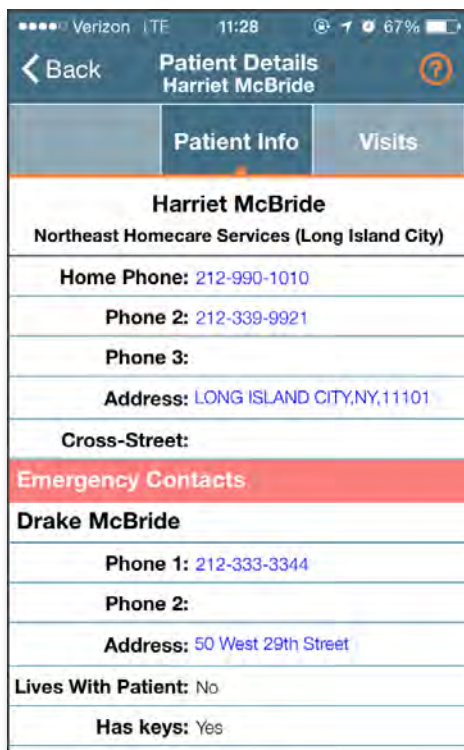


4. **Visits:** Select this option to review all scheduled Visits up to two weeks in advanced.

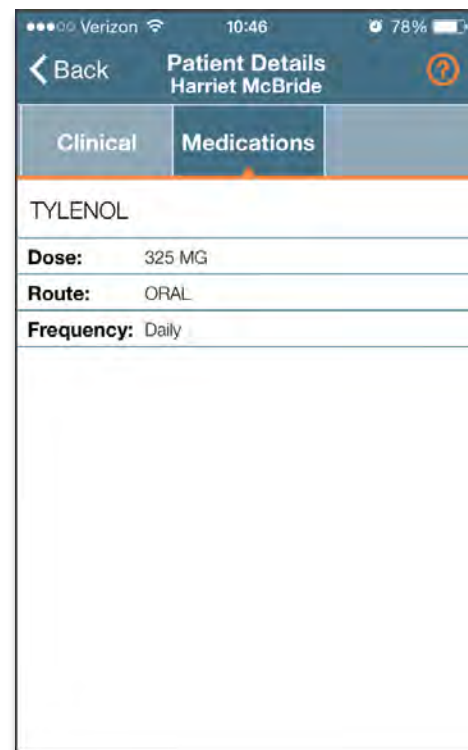


Completed and Scheduled Visits

5. **Patients:** A list of all the Patients you have access to. If you select a Patient, you may review **Patient Info**, **Visits**, and if you're authorized, their **Clinical** info and **Medications**.

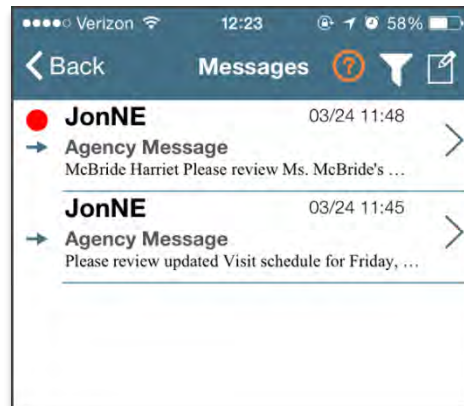


Patient Details: Info



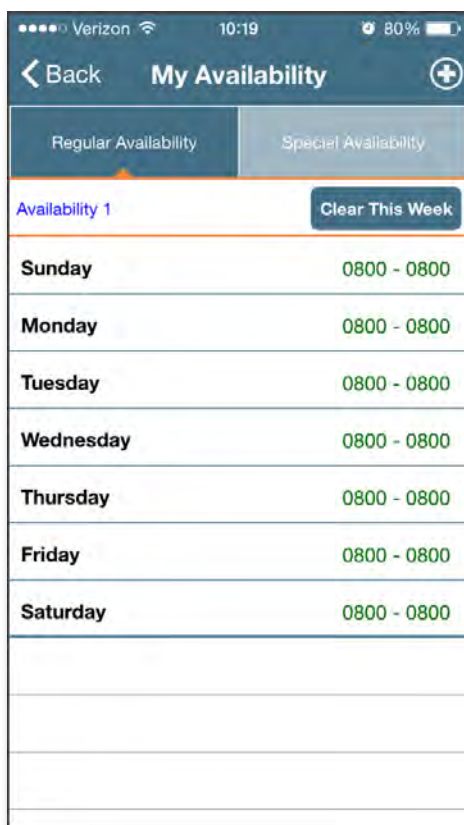
Patient Details: Medicaitons

6. **Messages:** Review and respond to any messages sent to you from you Agency/Office.

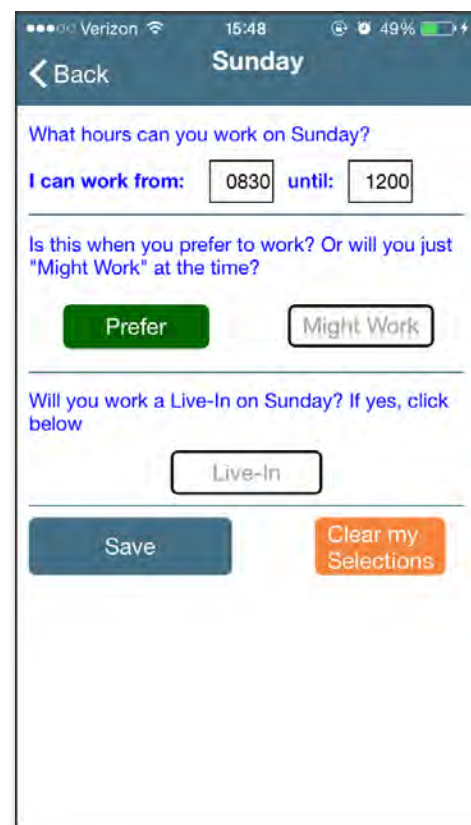


**Agency Messages**

7. **My Availability:** This function allows you to review your availability preferences. You may also adjust your preferences here, if your Office/Agency has activated the feature.



**My Availability**



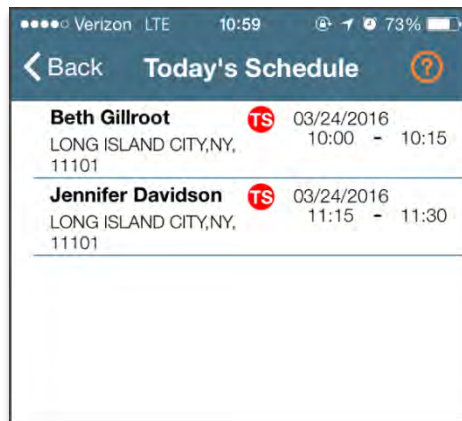
**Edit Regular Availability**

To edit your availability, select the day you wish to edit or click the [Clear This Week] button. You may also select the **Special Availability** tab at the top of the page to set an alternate availability schedule.

## Clocking In and Out

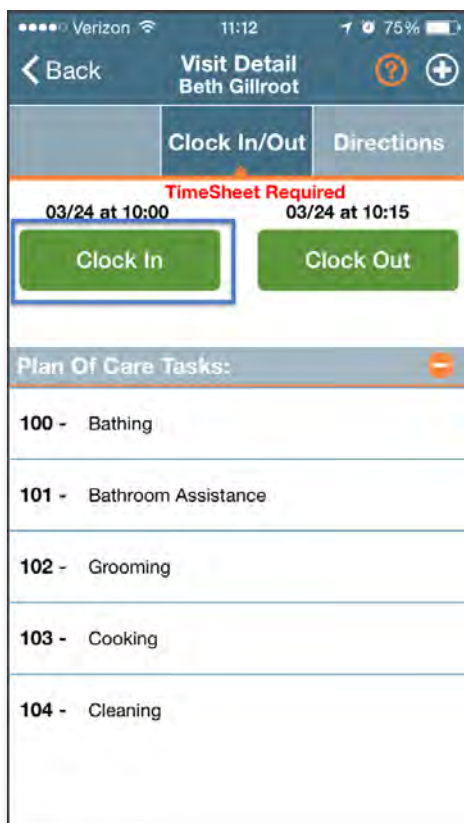
The following section will provide a step-by-step walkthrough of Clocking In and Out of a Visit, as well as entering POC Duties and Patient Signatures.

1. Select **Today's Schedule** from the Main Screen and select the appropriate Visit. For this example, we'll select the Patient **Beth Gillroot**:

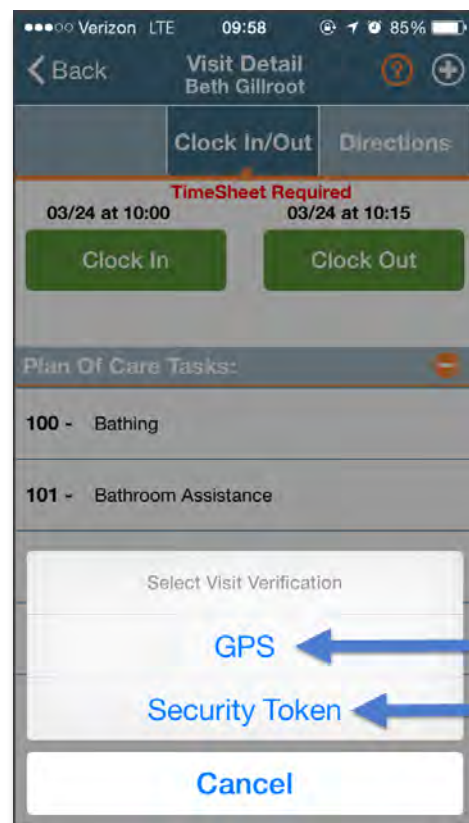


**Clock In and Out**

2. Once you select a Patient, you will be brought to the *Clock In/Out* tab of the **Visit Details** page. Click on the [Clock In] button and select either GPS or Security Token to submit an EVV:



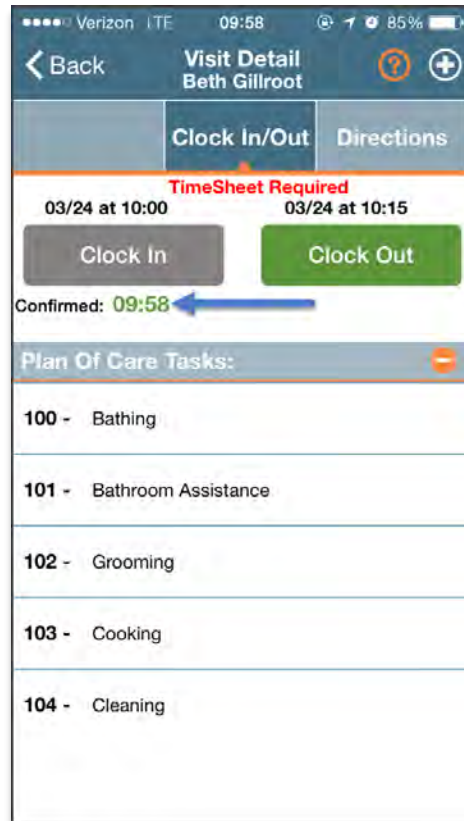
**Clock In/Out Tab**



**Select GPS or Security Token**

**Note:** The term *Security Token* refers to the FOB Device.

3. If the EVV was successful, it will display under the [Clock In] button in green. The [Clock In] button will also display in grey:

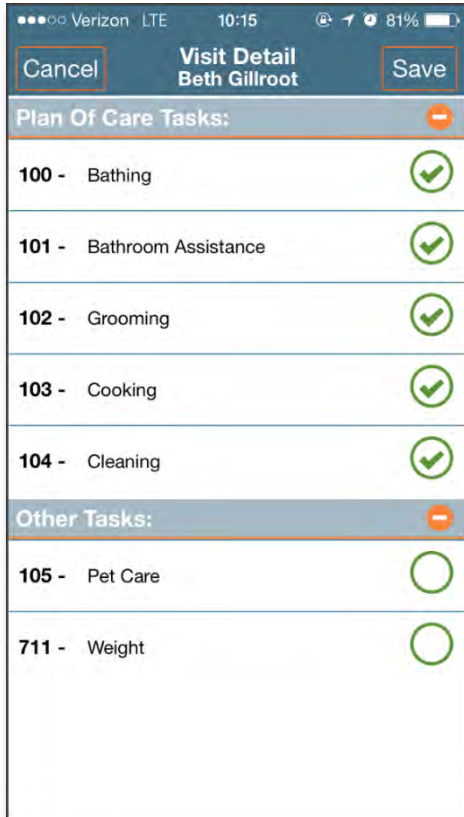


**Successful EVV**

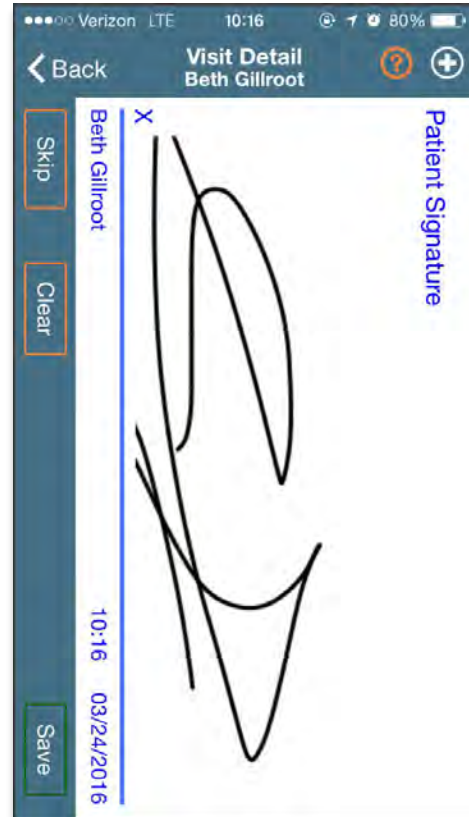
If the EVV was not successful, the EVV placement time will display in red instead of green.

4. From the **Visit Detail** page, you may also access:
  - a. *Directions* tab: Syncs to your mobile device's GPS to provide directions to the Visit location.
  - b. *Patient Info* tab: Displays the Patient's name, any phone numbers connected to the profile, their address, and emergency contacts.
  - c. *Care Plan* tab: This page contains the Patient's POC. It will list each duty in detail, describing how often it is required and any extra instruction.
  - d. *Notes* tab: This page will maintain a record of notes you, or the Agency, makes for the Visit.

- When you have completed the Visit, click the green [Clock Out] button on the *Clock In/Out* page. If the Visit included a Plan of Care, you will be prompted to select the duties you performed. Additionally, if the Contract authorizing the Visit requires a Patient Signature, you will be prompted to enter that as well:



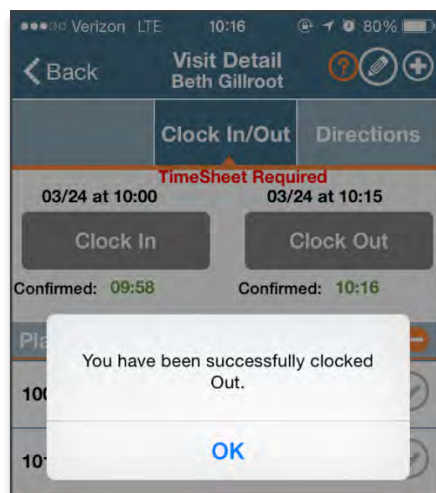
Enter POC Duties



Patient Signature

**Note:** The **Patient Signature** may be required at Clock In and/or Clock Out depending on the Contract authorizing the Visit. This feature is configured by the Agency.

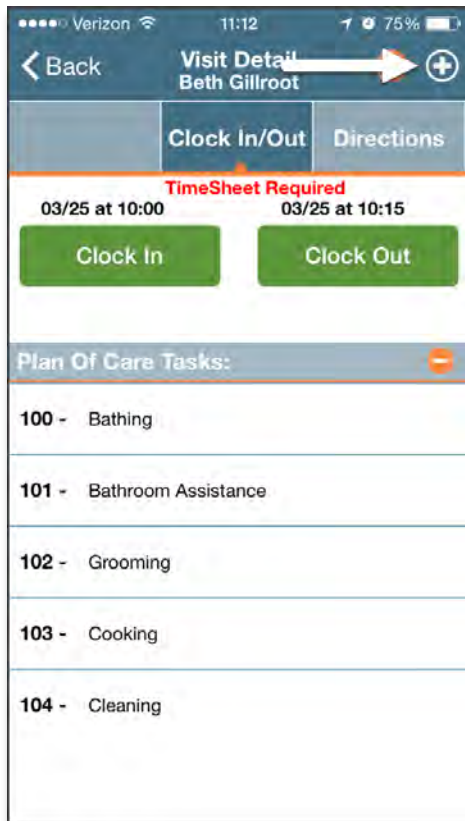
- Once you have completed the required screens, click [Save]. You will be brought back to the **Visit Details** page. A message reading “*You have been successfully clocked Out.*” will display:



Clock Out Confirmation Message

## Visit Note

At any time during or after a Visit, you may enter notes from the **Visit Details** page by clicking on the Add Note Icon (the circled plus sign):



**Add Note Icon**



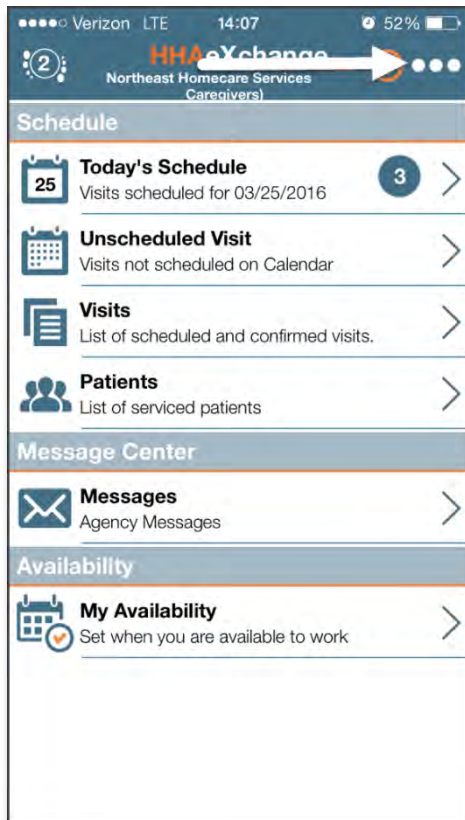
**Add A Text, Voice, or Image Note**

The dropdown menu contains options for adding a *Visit Text Note*, a *Visit Voice Note*, or a *Visit Image Note*. These notes may be reviewed by navigating to the *Notes* tab on the **Visit Detail** page. Once a Note is saved, it cannot be edited or deleted. Furthermore, any notes created on the Mobile App may be reviewed by your Agency/Office.

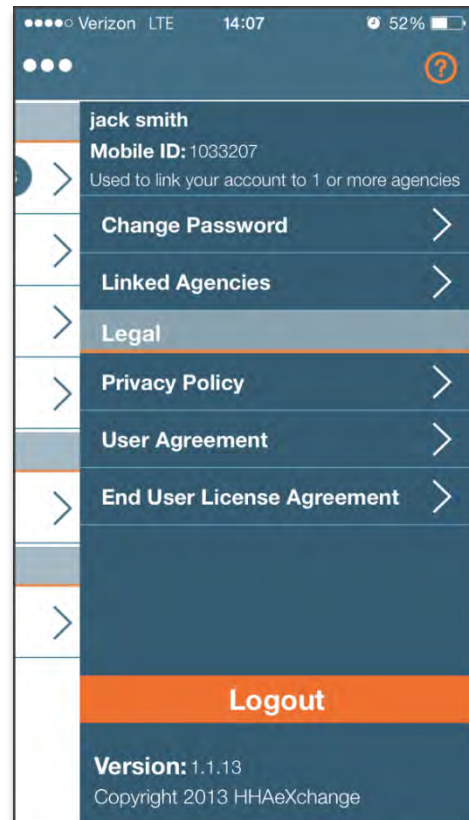
## Additional Features

### Settings and User Agreement

To change your password, see which Agencies/Offices you are linked to (and to unlink from them), as well as review the user agreement terms, click on the icon in the top right corner of the Main Screen:



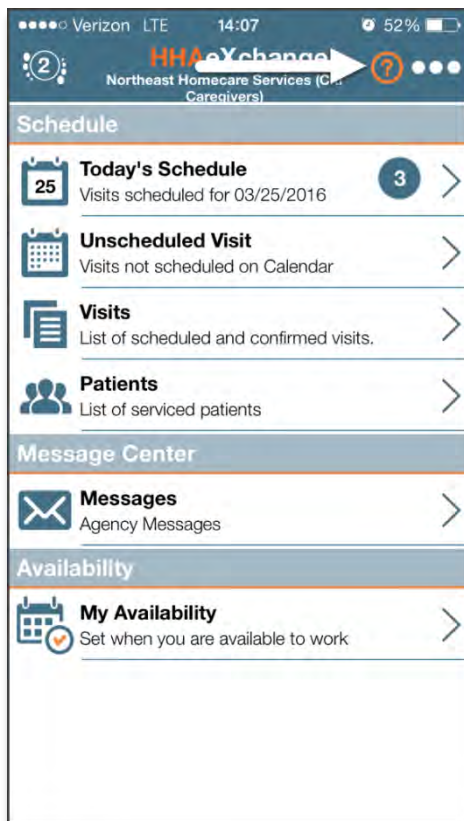
Settings Icon on the Main Screen



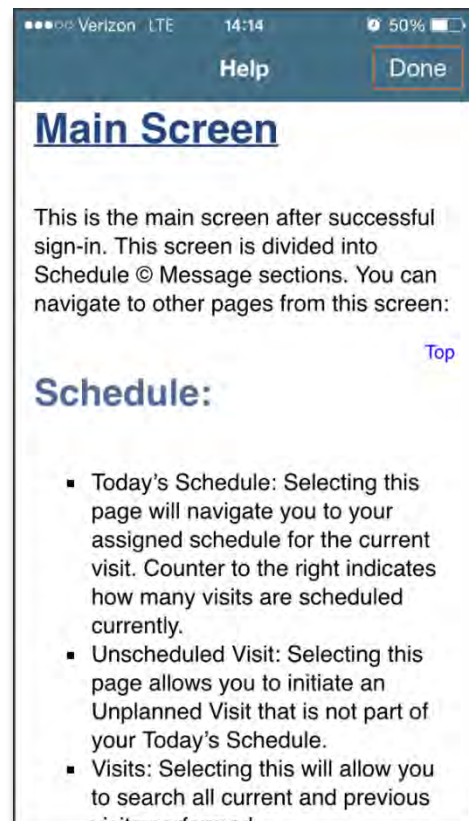
Settings Menu

## User Guide

You may access the Mobile App user guide at any time by clicking on the Help icon (the orange question mark) on the Main Screen:



Help Icon on the Main Screen

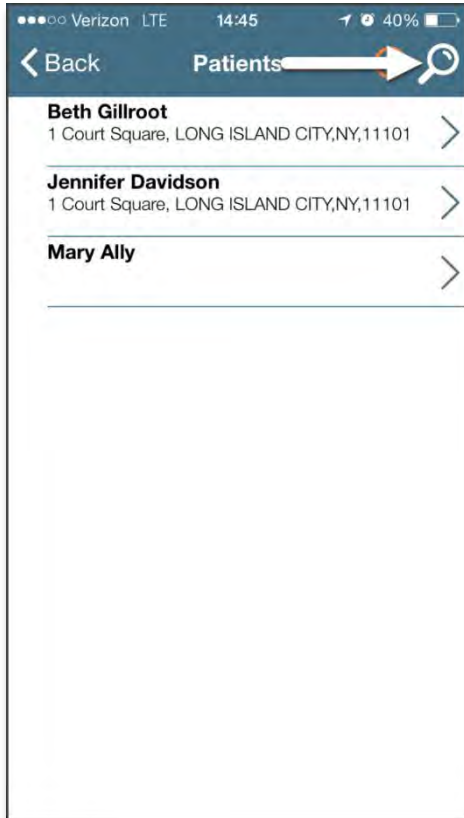


User Guide

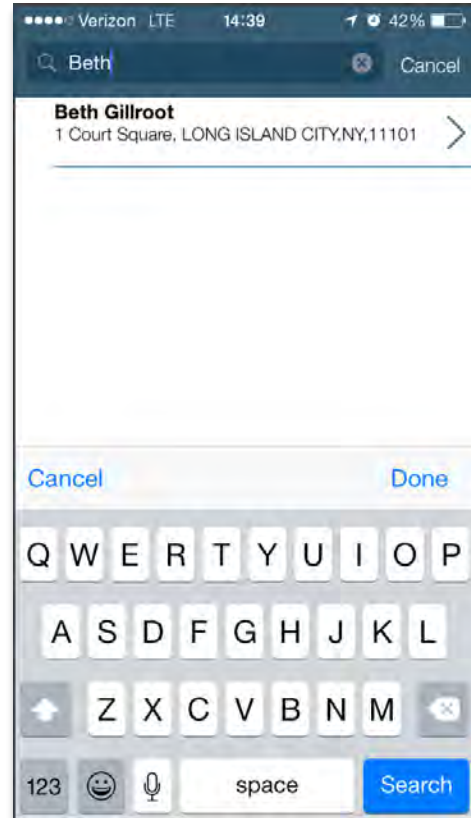


## Patient Search

On the **Patients** page, you can search for Patients you have access, or have provided service, to in the past using the Search icon, or the magnifying glass in the top right corner. Clicking this icon will open a search bar, prompting you to enter either the Patient's name or their address:



Search Icon on the Patient Page



Search for Patient