HHAeXchange

Caregiver Mobile App Process Guide

Caregiver Setup and Use

Document Revision History

Date	Description of Revision
09/14/2017	Initial version of the document
04/06/2018	Mobile App updates and applicable documentation
06/12/2018	Document updates
10/16/2018	Mobile App updates and applicable documentation: • Added Languages • Care Pathways • Patient Multi-Addresses • Patient Signature Requirements • Mutual Patients POC
2/15/2019	Addition of Consecutive Shifts
2/28/2019	Addition of Clock IN/OUT for Linked and Mutual Patients (Clocking IN/OUT)
04/10/2019	Added: Patient Phone Number Descriptions Added: Mobile Offline Mode (Android)

Table of Contents

Overview

The **HHAX Mobile App** is a tool used to place EVVs, review Patient and Visit information, manage Availability, and express interest in open shifts. 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.

DISCLAIMER	Some Mobile App features are activated by System Administration. Please contact HHAX Support Team for details, setup, and guidance.

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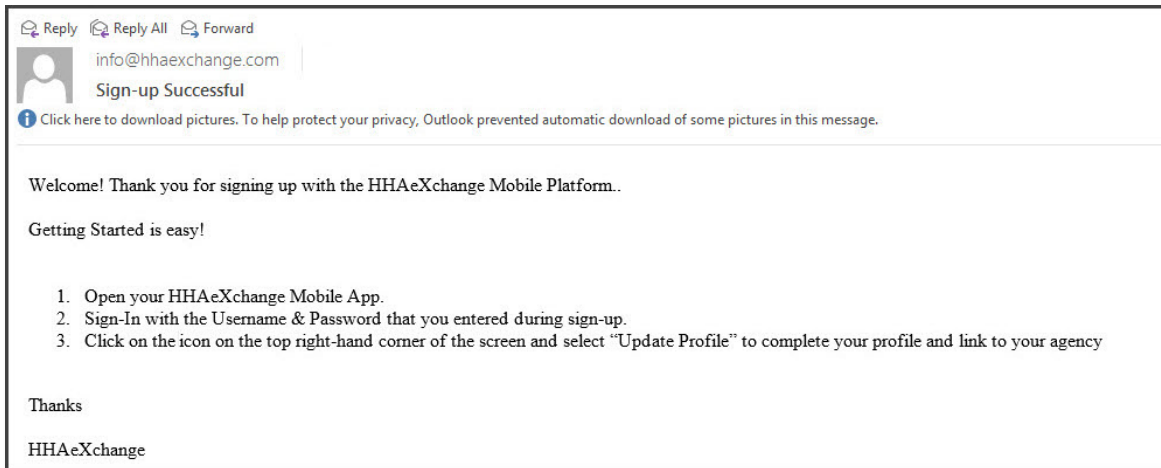
- An **Email Address**
- A **Password** (minimum of 8 letters, 1 capital, and 1 numeric value)

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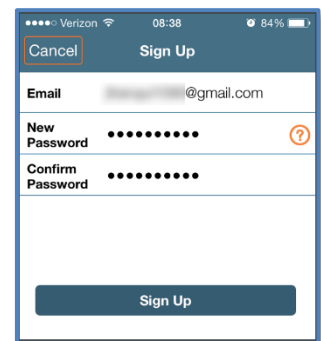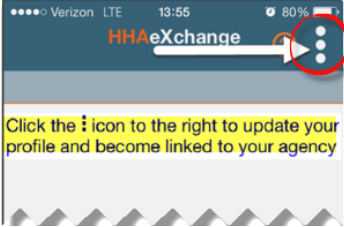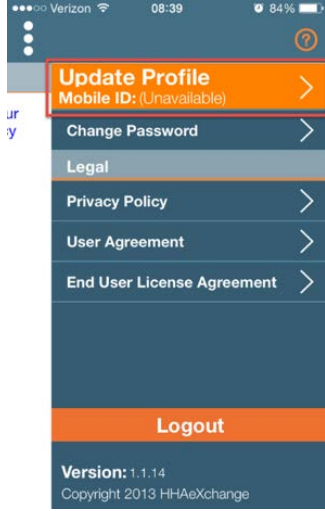

Sign Up Screen

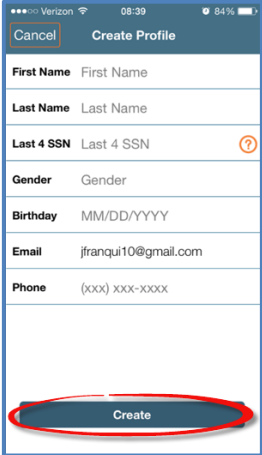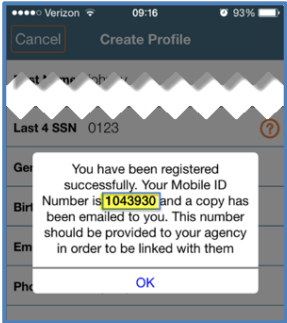Upon successfully creating an account, the system issues a verification email:

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:

> **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.
>
> Dear **Johnny 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.
> 4. Once your agency activates your Mobile App profile in their systems, you will see Patient and Visit information in your Mobile App!
>
> **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, receive and respond to messages from their Office/Agency, and Clock In and Out of a Visit.
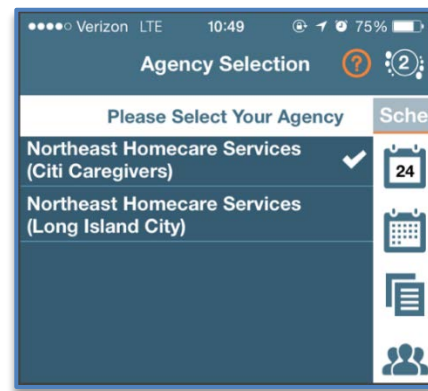
The following sections provide descriptions and guidance on the various options on the Main Screen.
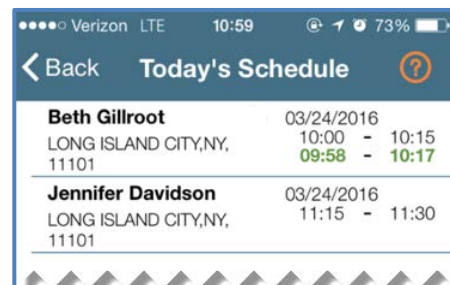
The Main Screen

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.
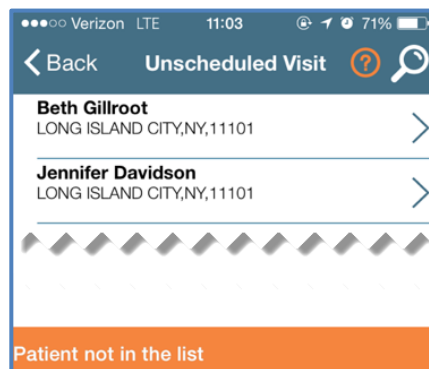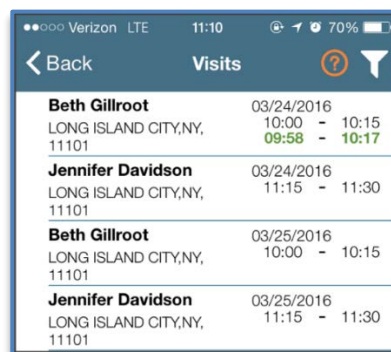

Create Unscheduled Visits

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

Visits (4)

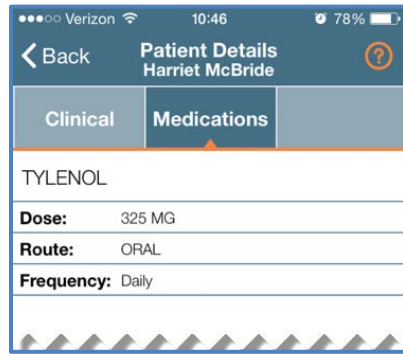Select **Visits** to review all scheduled Visits up to two weeks in advance.

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.

If authorized, Caregivers may also access the Patient's **Clinical** info and **Medications**.

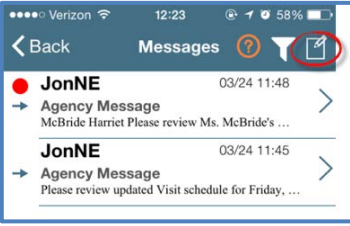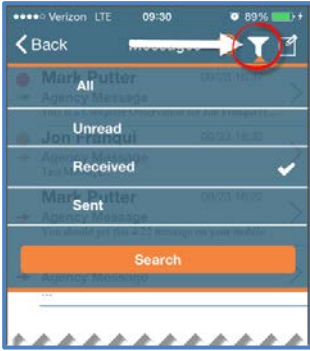**Patient Details: Medicaitons**

Patient Details: Info

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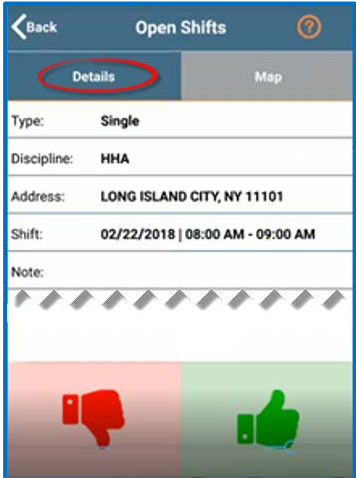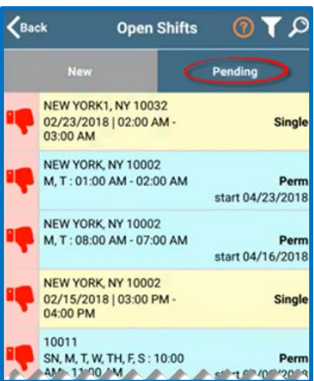

Patient Multi-Address

Messages (6)

Select **Messages** to review and respond to any messages sent from the Agency/Office. Follow the steps below to create, send, and filter messages on the Mobile App.

Step	Action
1	Click the notepad icon (as seen on the image) to enter a new message or respond to an existing one. **Agency Messages**
2	The Message window opens. Click the ***plus*** icon to select a recipient (To) and Priority. Compose the message in the text area. Click the ***Send*** button to send the message.
3	To sort existing messages, click the ***filter*** icon highlighted in the *Sort Messages* image.

Open Shifts (7)

Select **Open Shifts** to review and request open shifts as broadcasted by the Agency/Office. Follow the steps below to view and express interest in broadcasted Open Shifts.

Step	Action
1	The **Open Shifts** screen appears displaying all broadcasted shifts on the **New** tab. The shifts highlighted in yellow are single shifts; the ones in blue are permanent shifts.
2	After clicking on the line item, the **Details** tab opens providing simple information. Select "**thumbs up**" (to express interest in working the shift) or "**thumbs down**" (to reject and remove from the list) after evaluating the shift. Click on the **Map** tab to access the Google Map visual. *Note: As per HIPAA regulations, only the **City, State** and **Zip Code** can be provided at the time of broadcast. Once assigned, the Caregiver can view the complete Patient address.*
3	Requested shifts move to the **Pending** tab, pending assignment from the Agency's Coordinator.

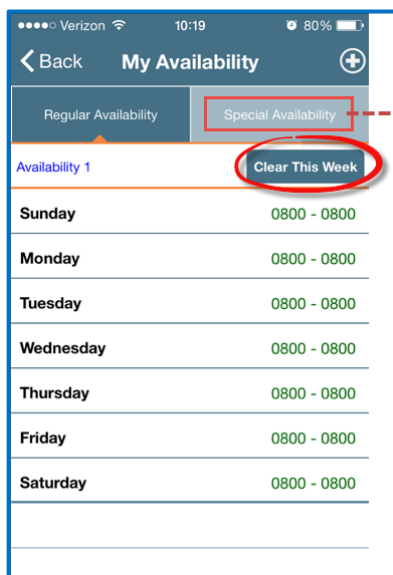| Step	Action
4	If a shift is assigned to the Caregiver, the shift moves from the Pending tab to the Caregiver's **Visit** section. The Caregiver is alerted of the assignment. If the Agency _rejects_ the request, the shift is removed from the Pending tab and a message is sent to the Caregiver with the reject reason (such as "Shift no longer available").	

> **Notes:**
> - *Indicating interest (thumbs up) does not mean that a Caregiver is automatically given a shift. Shifts must be officially assigned by the Agency's Coordinator. Only then does a Caregiver receive an alert and the shift appears as a scheduled Visit on their Mobile App.*
> - *The Caregiver must be logged in to the Mobile App to review Case Broadcasts in the Open Shifts screen.*
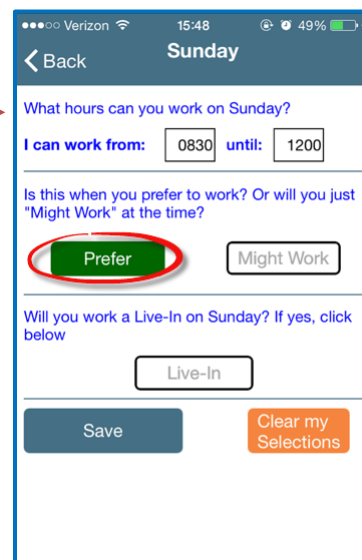
My Availability (8)

The **My Availability** function allows Caregivers to review their availability preferences as well as adjust preferences; provided the Office/Agency has enabled this feature.

To edit Availability, select the day to edit or click the **_Clear This Week_** button. Select the **Special Availability** tab at the top of the page to set an alternate availability schedule.
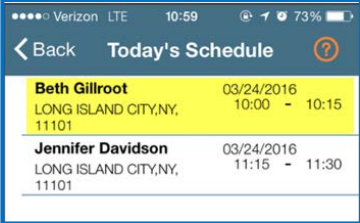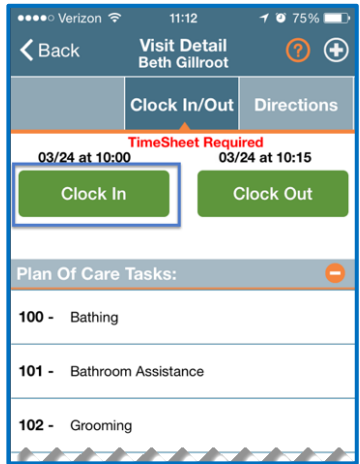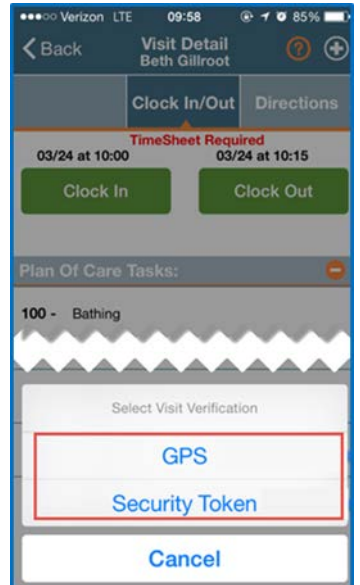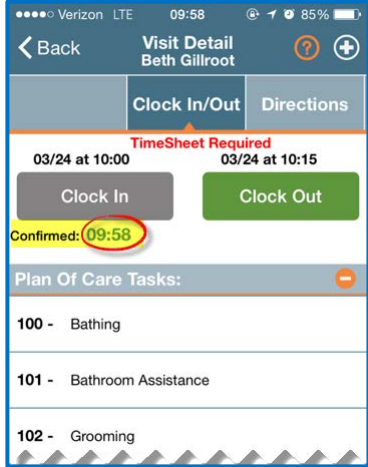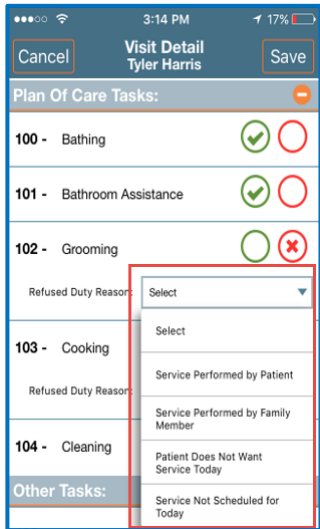

My Availability

Edit Regular Availability

Clocking In and Out

This section provides the steps involved when Clocking In and Out of a Visit, as well as entering POC Duties and Patient Signatures.

Step	Action
1	Select **Today's Schedule** from the Main Screen. Select the appropriate Visit. For example, **Beth Gillroot**. *Clock In/Out Tab screenshot*
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.
Notes tab	This page maintains a record of notes the Caregiver or Agency makes for the Visit.

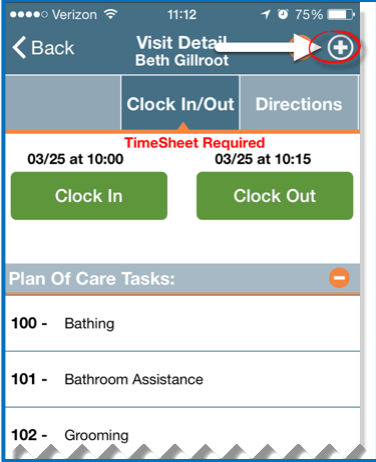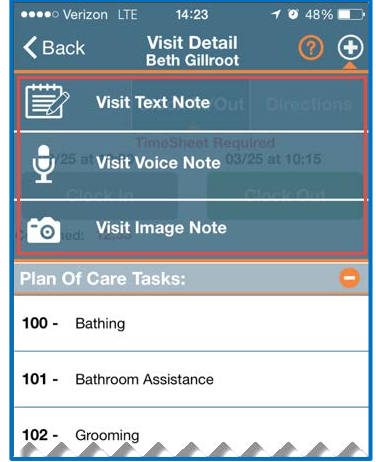| 6 | When the Visit is completed, click the green Clock Out button on the *Clock In/Out* page. If the Visit included a Plan of Care (POC), the Caregiver is prompted to select the duties performed.

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	If the Contract authorizing the Visit requires a Patient Signature, the Caregiver must obtain the signature on the device to process the Visit. **Skip Signature Disabled** **Patient Signature Required Alert** *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.*
8	If the Agency allows the Caregiver to skip the Patient Signature, then the Caregiver is prompted to click the **Skip** button and select the reason why the Patient cannot sign (required). The **Save** button is unavailable until a reason is selected. **Skip Signature Enabled Alert** **Select/Save Skip Reason**
9	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**

For standard Clock IN and OUT of Linked and Mutual Patient Visits, refer to the Mobile App Clock IN/OUT of Linked and Mutual Visits Job Aid.

Visit Note

Visit Notes can be entered during or after a Visit. Follow the steps outlined below to enter a Visit Note.

Step	Action	
1	From the Visit Details page, click the **Add Note** icon (the circled plus sign), as pictured in the image to enter Visit Notes.	**Add Note**
2	Select the Note Type: 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.	**Add A Text, Voice, or Image Note**

Care Path Functionality Updates

Care Path-related tabs (Observations and Care Path) appear for Patients who have assigned clinical pathways. Refer to the Mobile App Care Paths Job Aid for Caregiver instructions.

## Consecutive Shifts

The **Consecutive Shifts** feature on the HHAX Mobile App allows Caregivers to perform a single Clock-IN and Clock-OUT for consecutive shifts for the same Patient or a Consecutive Shift for two Linked Patients (Internal Contract); such as a husband and wife receiving back-to-back services at the same address. Refer to the Mobile App Consecutive Shifts Job Aid for instructions.

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.
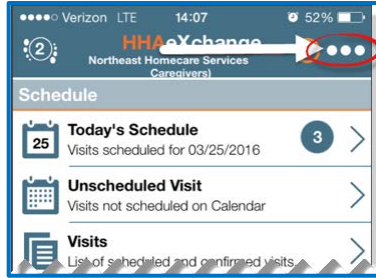
Settings Icon on the Main Screen
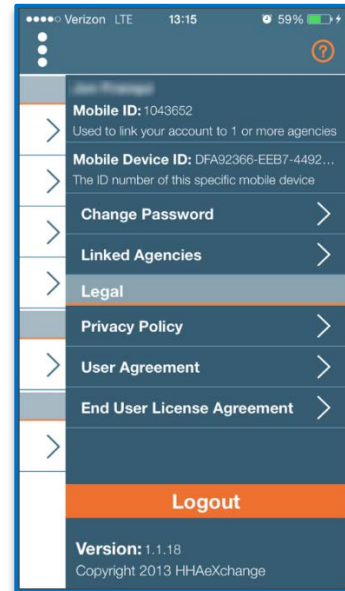
Settings Menu

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.

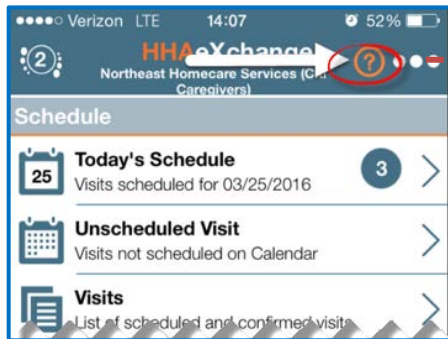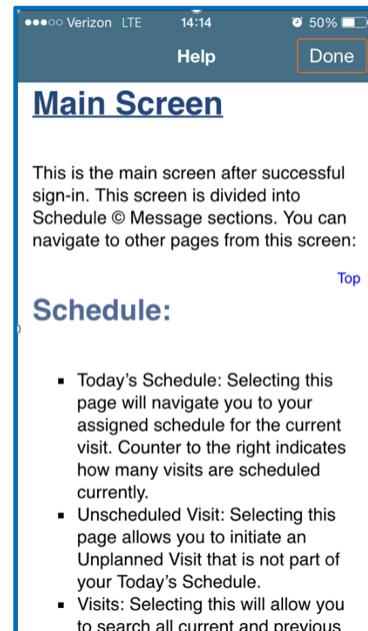On the **Patients** page, click the Search icon (magnifying glass) to open the search bar prompting the entry of either a Patient's Name or their Address.
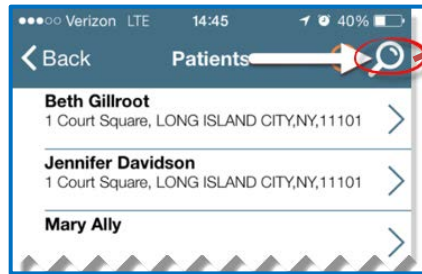
Search Icon on the Patient Page
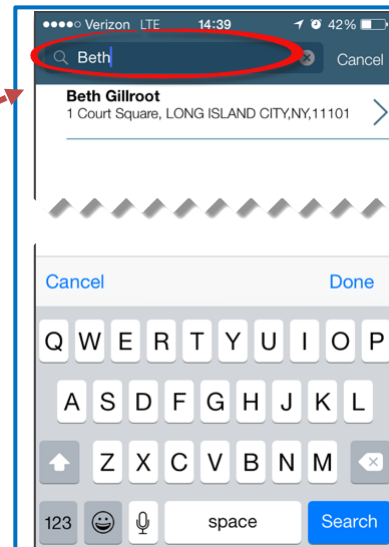
Patient Search

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**

Patient Phone Number Descriptions

Patient phone number labels appear on the Mobile app corresponding to the descriptions entered in the **Phone 2** and **Phone 3** fields in the Patient Profile in the HHAX system, as seen in the following image.
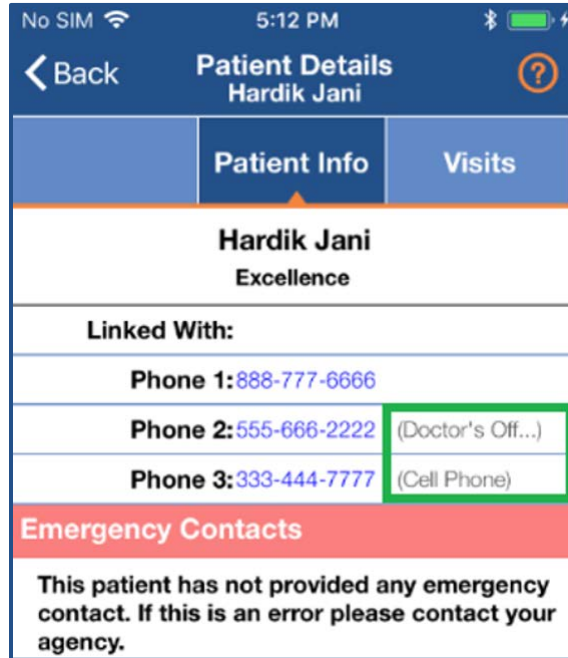
Phone Number Description Labels

Mobile App Offline Mode (Android)

> This feature is currently only available for Android devices. By default, this feature is *not* activated, and the **Enable Mobile Offline Mode** field is *read-only*. Please contact HHAX Support Team for activation details, setup, and guidance.

This feature allows Caregivers to use the Mobile App when there is no internet connectivity; later to synchronize when connectivity is restored. With this feature enabled at the Office level, Caregivers can Clock IN/OUT successfully while offline. Once the internet connectivity is restored, the Mobile App synchronizes with the HHAX system and new and modified Visit information is exchanged between the HHAX System and the Caregiver Mobile App according to the Agency-defined sync period.

Synchronization occurs for the Caregiver on the Mobile App when any of the following actions take place online:

- Logging In
- Switching Agencies
- Changing Languages

During synchronization, the Mobile App downloads the next Visits for the synchronization period as defined by the Agency at the Office Level. This value can range from 24 hours to 120 hours with 24 hours as the default.

The only indicator that the Caregiver has when in Offline mode is the Offline Mode Active message alert that appears at the bottom of the Home screen (as seen in the image).

When in Offline Mode, the Caregiver can access Visits via the **Today's Schedule** screen and perform the following:

- Clock-IN/OUT
- Signature with Skip, and
- Enter Duties
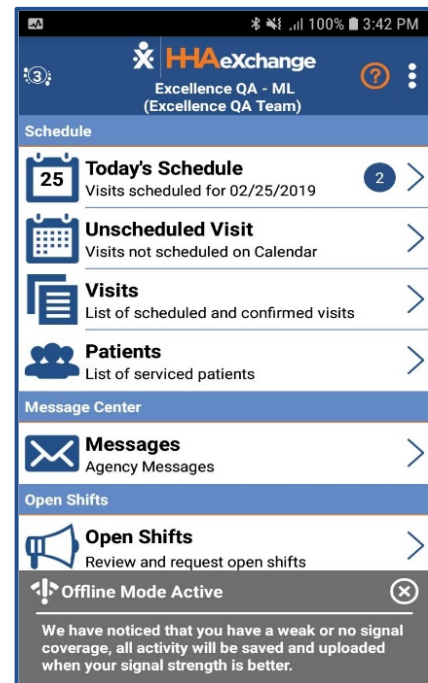
Mobile App Offline Mode Active

Outside of the actions listed above, all other Mobile App functions are unavailable in Offline Mode. Selecting any other function results in the **Network Notice** screen (as seen in the image).
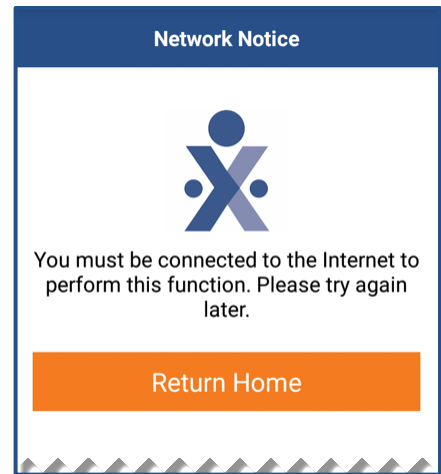
Not Supported in Offline Mode:

- My Availability
- Open shift
- Messages
- Patients
- Unscheduled Visits
- Sign up

- Forgot Password
- Change Password
- Change Language
- Change Agencies
- Notes
- Care Path and Observations

Network Notice

You must be connected to the Internet to perform this function. Please try again later.

Return Home

Mobile App Network Notice

Caveats

Note the following caveats regarding the behavior of the Mobile App while in Offline Mode:

1. When online, Visits created on the same day by the Agency are almost immediately available to the Mobile App when the Caregiver goes to **Today's Schedule**. In Offline Mode, this behavior changes and new and modified visit data is not available until synchronization occurs (i.e., when the user *logs in*, *switches agencies*, *switches languages* or clicks on *Unscheduled Visit*, *Visits* or *Patients*).

2. If the Caregiver is in **Today's Schedule** when online and then goes offline, then the Caregiver is redirected back to the home page where the **Offline Mode Active** message appears. Note that once offline, the Caregiver may start a Visit which is then altered by the Agency. In this case, any reconciliation of that Visit must be performed manually by the Agency after the Caregiver goes back online and synchronization takes place.

3. When offline, the Confirmed Time of a completed Visit is calculated using the device's local time and reconciled with the HHAX system once Internet connectivity is restored.

4. When an Agency has the Enable Offline Mode selected, if the Caregiver performs a Clock In through an **Unscheduled Visit**, then the Clock Out must be performed using **Today's Schedule**.

Note: To prevent disruption to the Caregiver synchronization process, it is recommended that Mobile Offline Support for your Office be enabled outside of regular business hours.

Offline Authentication

Because credentials cannot be authenticated with the HHAX system when offline, the Mobile app securely stores the last known credentials on the mobile device for the Caregiver to log in when in Offline Mode. The user is allowed up to 3 attempts to login before they are prompted to wait 3 minutes to retry.