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

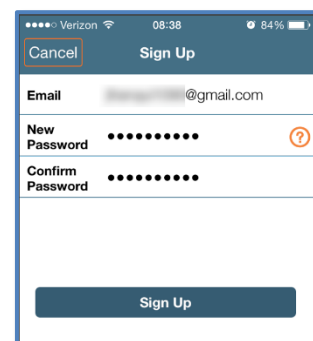Creating an account for the Mobile App is a two-step process, as follows:

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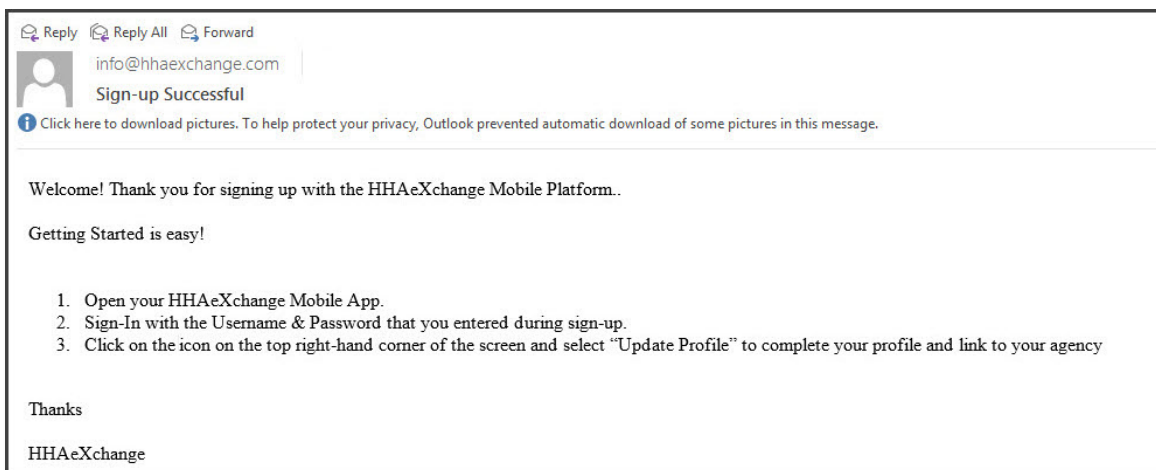
- An **Email Address**
- A **Password** (minimum of 8 letters, 1 capital, and 1 numeric value)

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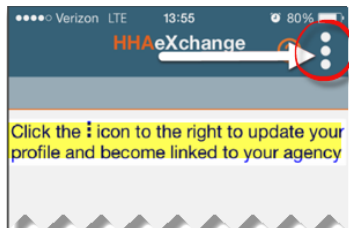
Sign Up Screen

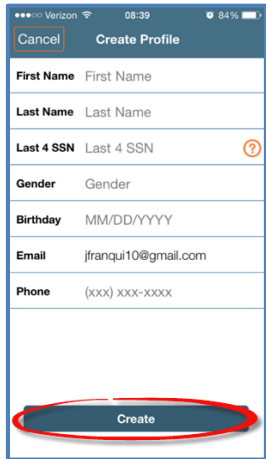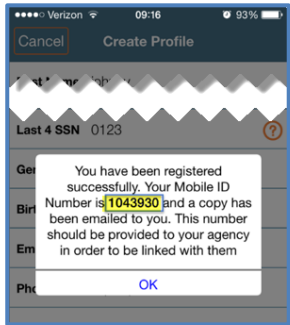Upon successfully creating an account, the system issues a verification email:

Reply Reply All Forward

info@hhaexchange.com
Sign-up Successful

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Welcome! Thank you for signing up with the HHAeXchange Mobile Platform..

Getting Started is easy!

1. Open your HHAeXchange Mobile App.
2. Sign-In with the Username & Password that you entered during sign-up.
3. Click on the icon on the top right-hand corner of the screen and select "Update Profile" to complete your profile and link to your agency

Thanks

HHAeXchange

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:
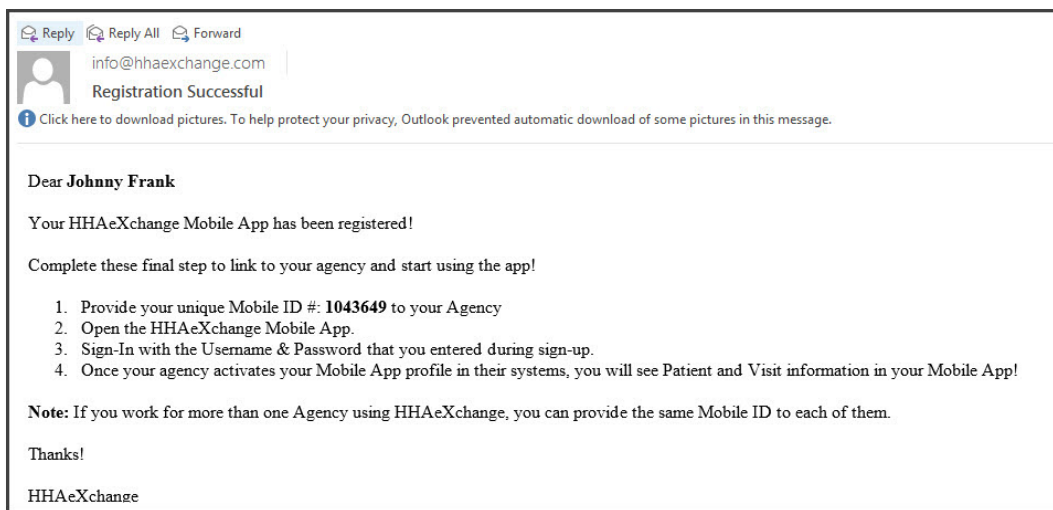
Successful Registration Email

Using the Mobile App

The Main Screen

Via the Mobile App Caregivers keep track of their schedule, 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.
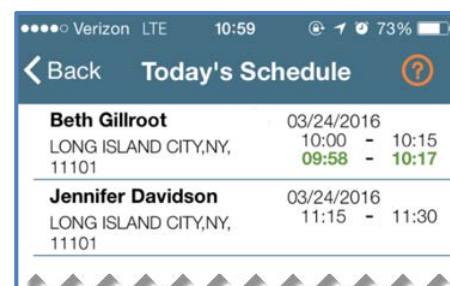

The Main Screen

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.
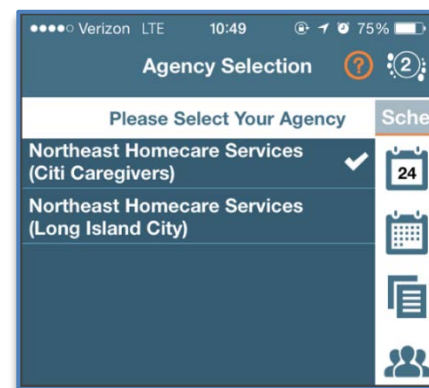
Switch Offices

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.
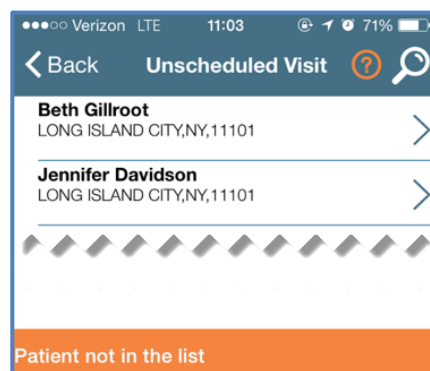
Create Unscheduled Visits

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.
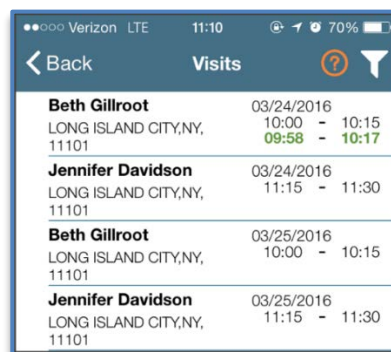
Completed and Scheduled Visits

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**.
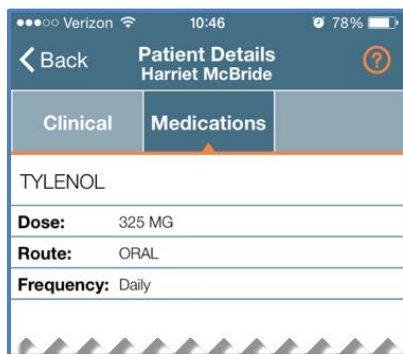
Patient Details: Medicaitons

Patient Details: Info

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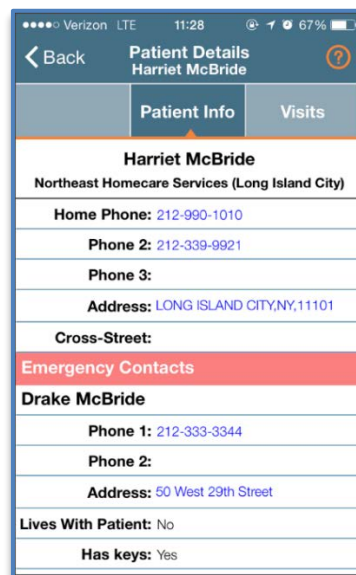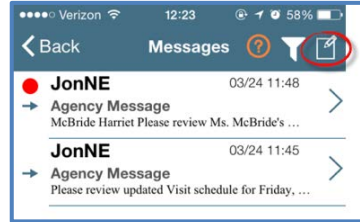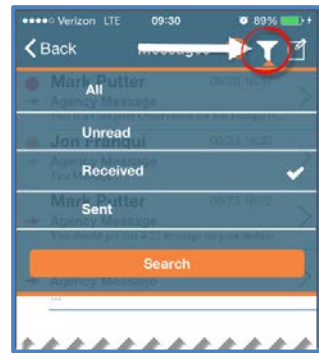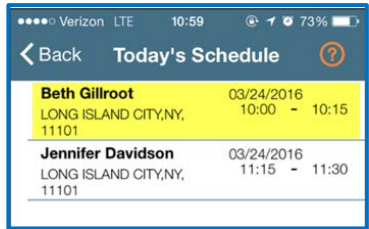

Patient Multi-Address
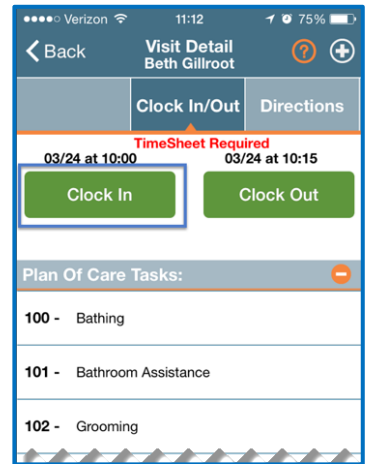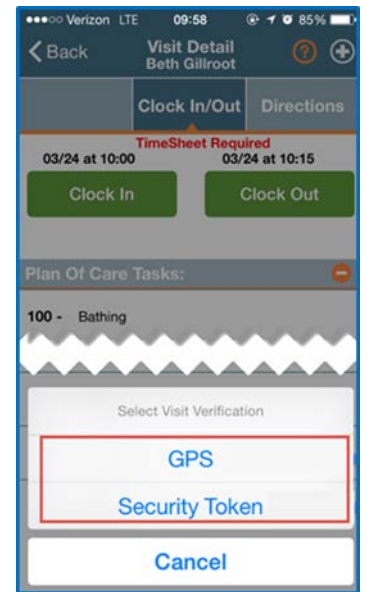
Messages (6)

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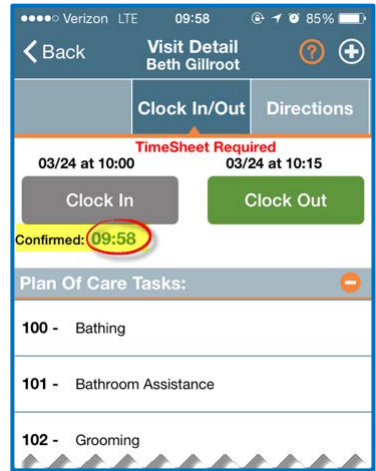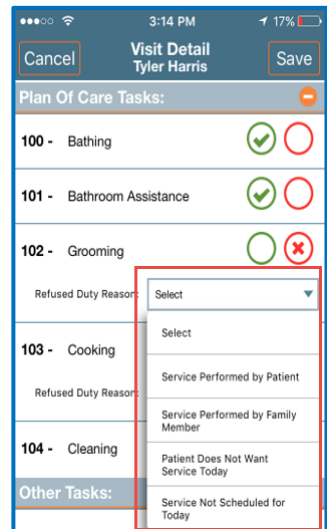
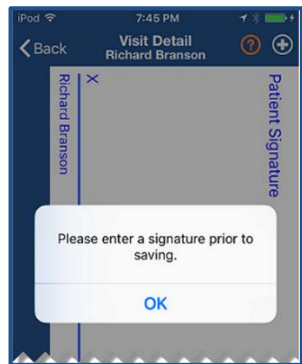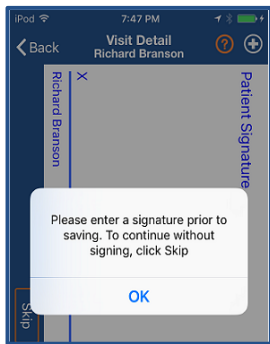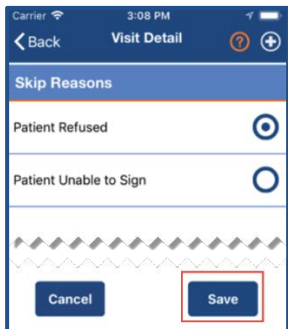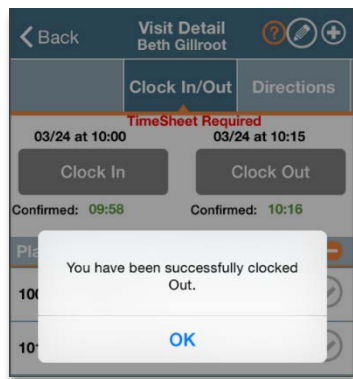| Step	Action
1	Click the notepad icon (as seen on the image) to enter a new message or respond to an existing one. **Agency Messages**
2	The Message window opens. Click the **plus** icon to select a recipient (To) and Priority. Compose the message in the text area. Click the **Send** button to send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

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**.
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.

| 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	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.

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.
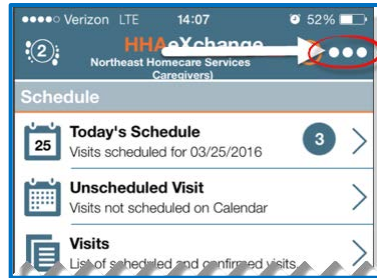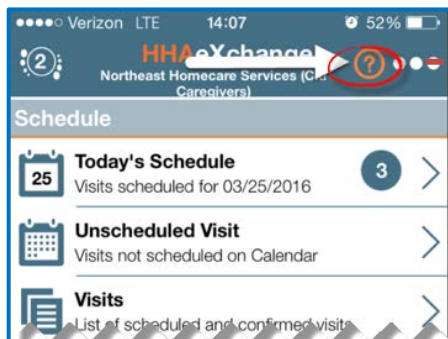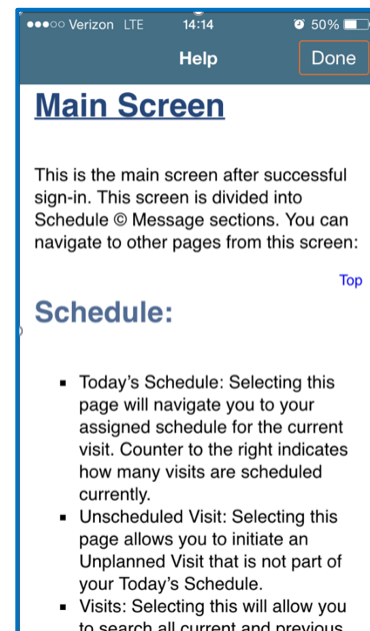

Settings Icon on the Main Screen

Settings Menu

User Guide

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

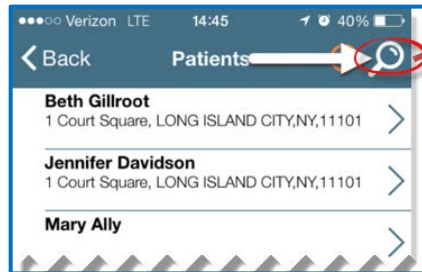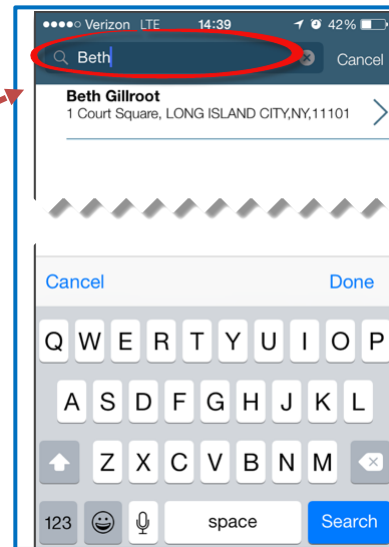**Settings Icon on the Main Screen**

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.
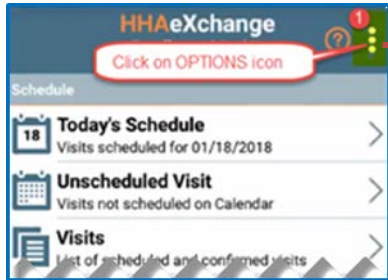

Search Icon on the Patient Page

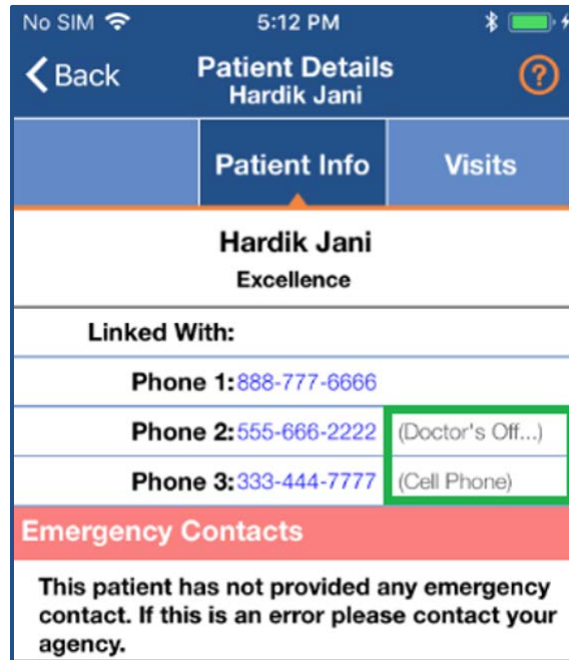**Patient Search**

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