

# Validating Your Data in HHAExchange

Customer Onboarding: a short checklist to confirm your data is set up correctly.

## Why we're asking

This step is part of the customer onboarding validation process. Once your caregiver and patient information is loaded into HHAExchange, you'll spend a few minutes spot-checking records to confirm the data imported correctly.

Most customers complete this process in 15–30 minutes, and your PM will guide you through it during the call. It also serves as a quick introduction to where your data lives in the portal.

## Before you begin

- Log in to your HHAExchange portal
- Keep a copy of the data you sent us nearby (the spreadsheet, scanned forms, or a printout)
- Set aside about 15–30 minutes to complete the process. Most customers finish in under 20 minutes
- Join the call with your PM who will walk through the process with you the first time

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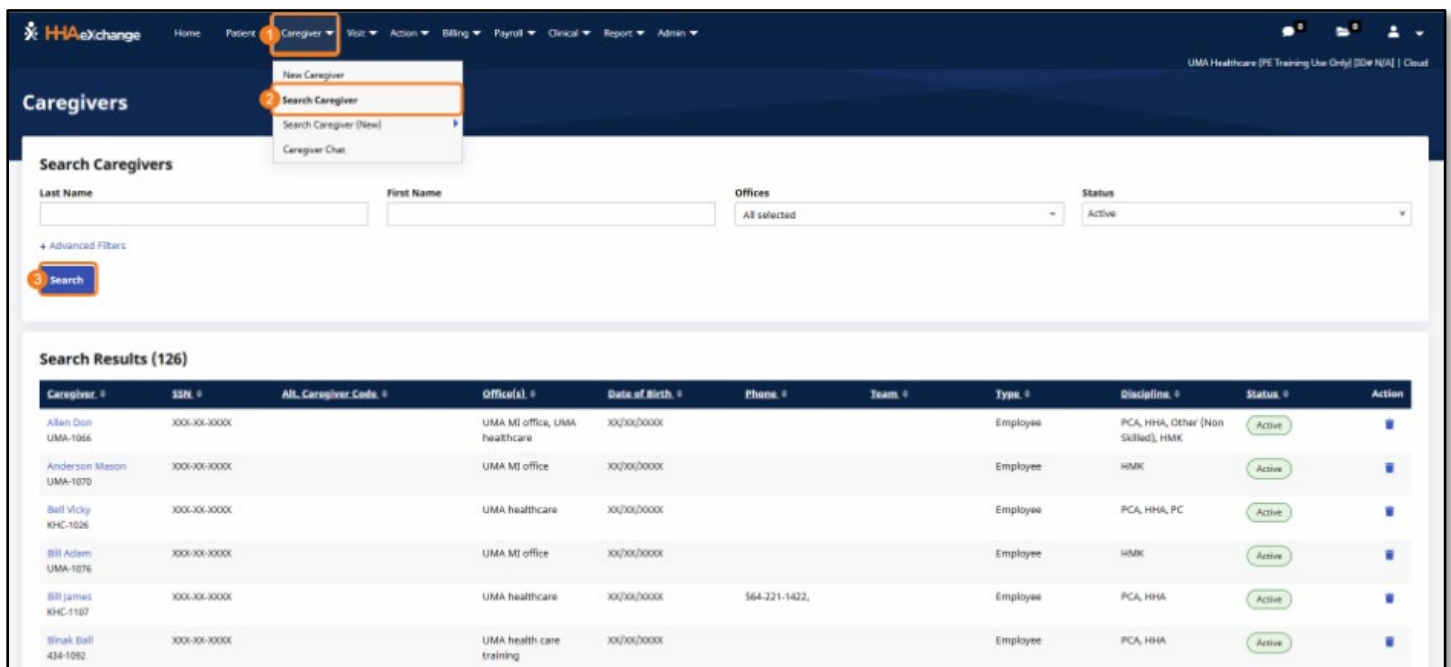
Customer Onboarding: a short checklist to confirm your data is set up correctly.

## Validation steps

Work through the steps in order. Your PM will be there to help you find each screen.

### Step 1 – Pull up your caregiver records

- ☐ Navigate to **Caregiver** > **Search Caregiver** > Click **Search** to display all uploaded caregivers in your HHAExchange portal



The screenshot shows the HHAExchange portal interface. At the top, the navigation menu includes 'Home', 'Patient', 'Caregiver', 'Visit', 'Action', 'Billing', 'Payroll', 'Clinical', 'Report', and 'Admin'. The 'Caregiver' menu is expanded, showing options: 'New Caregiver', 'Search Caregiver', 'Search Caregiver (New)', and 'Caregiver Chat'. The 'Search Caregivers' section contains search filters for 'Last Name', 'First Name', 'Offices' (set to 'All selected'), and 'Status' (set to 'Active'). A 'Search' button is highlighted with a red circle and the number '3'. Below the search filters, a table titled 'Search Results (126)' displays a list of caregivers with columns: Caregiver, SSN, Alt. Caregiver Code, Office(s), Date of Birth, Phone, Team, Type, Discipline, Status, and Action. The table lists several caregivers, including Allan Don, Anderson Mason, Bill Vicky, Bill Adam, Bill James, and Binak Ball, all with 'Active' status.

Your **PM** will **guide you** through the navigation the first time.

Going forward, this is where you'll access and manage all caregiver records in HHAExchange.

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### Step 2 – Spot-check 5 caregiver records

You don't need to review every caregiver record – that's not the goal of this step. Instead, select 5 caregivers you know well (or choose them at random) and confirm that the key information appears correctly in HHAExchange.

Open each record and review the details below. A screenshot for reference is found below the chart.

✓	What to check	What you're looking for	Pass when...
2a <input type="checkbox"/>	Click on a caregiver's name to open the caregiver record.	Their name, date of birth, address, and phone number are visible on the profile.	All required are populated.
2b <input type="checkbox"/>	Compare the address and phone to what you sent us (or what you know to be current).	The address and phone match – minor abbreviation differences are fine ("St" vs "Street").	The data matches your records.
2c <input type="checkbox"/>	Confirm the caregiver is assigned to the correct office.	If you have multiple offices, the caregiver shows up under the right one.	The caregiver is assigned to the correct office.
2d <input type="checkbox"/>	Repeat the above steps for 4 additional caregivers.	Pick a mix – newer hires, longer-tenured caregivers, different offices if applicable.	All 5 caregiver records pass the same checks.

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2c <input type="checkbox"/>	Confirm the caregiver is assigned to the correct office.	If you have multiple offices, the caregiver shows up under the right one.	The caregiver is assigned to the correct office.
2d <input type="checkbox"/>	Repeat the above steps for 4 additional caregivers.	Pick a mix – newer hires, longer-tenured caregivers, different offices if applicable.	All 5 caregiver records pass the same checks.

# Welcome to HHAeXchange

Customer Onboarding: what to expect when sending us your patient and caregiver data.

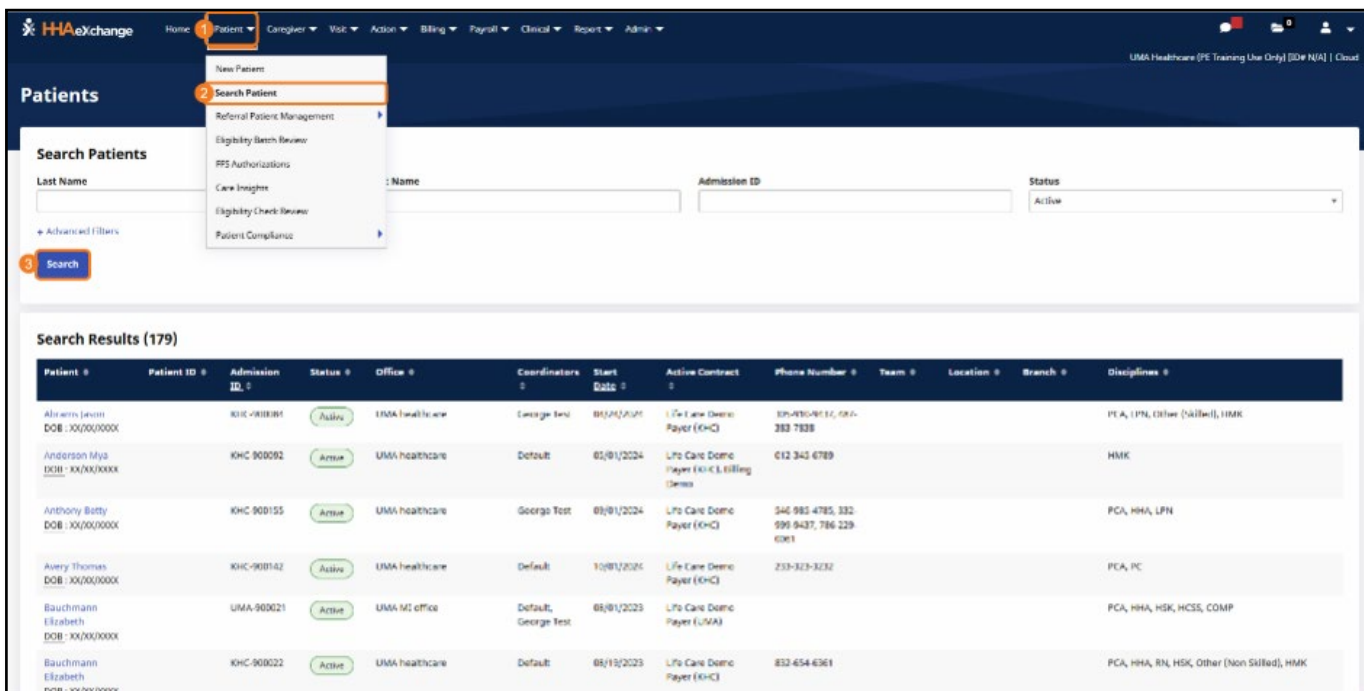
## Validation steps

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### 3. Pull up your patient records

Navigate to **Patient > Search Patient > Click Search** to display all uploaded patients in your HHAeXchange portal.

Going forward, this is where you'll access and manage all patient records in HHAeXchange.



The screenshot displays the HHAeXchange portal interface. At the top, the 'Patient' menu is open, with 'Search Patient' highlighted. Below the menu, the 'Search Patients' form is visible, featuring input fields for 'Last Name', 'Name', 'Admission ID', and 'Status'. A 'Search' button is located at the bottom left of the search area. The search results are displayed in a table with 179 entries. The table columns include Patient ID, Admission ID, Status, Office, Coordinators, Start Date, Active Contract, Phone Number, Team, Location, Branch, and Disciplines. The first few rows of the table are as follows:

Patient	Patient ID	Admission ID	Status	Office	Coordinators	Start Date	Active Contract	Phone Number	Team	Location	Branch	Disciplines
Alvarres Jevoni DOB: XXXXX/XXXX	KHC-900081		Active	UMA Health Care	George Test	05/24/2024	Life Care Demo Payer (KHC)	334-454-4361, 855-383-7838				PCA, LPN, Other (Skilled), HMK
Anderson Mya DOB: XXXXX/XXXX	KHC-900092		Active	UMA healthcare	Default	05/01/2024	Life Care Demo Payer (KHC, L Billing Demo)	012-345-6789				HMK
Anthony Betty DOB: XXXXX/XXXX	KHC-900155		Active	UMA healthcare	George Test	05/01/2024	Life Care Demo Payer (KHC)	946-985-4785, 332-999-9437, 786-229-6081				PCA, HHA, LPN
Avery Thomas DOB: XXXXX/XXXX	KHC-900142		Active	UMA healthcare	Default	10/01/2024	Life Care Demo Payer (KHC)	233-323-3232				PCA, PC
Bauchmann Elizabeth DOB: XXXXX/XXXX	UMA-900021		Active	UMA HQ office	Default, George Test	05/01/2023	Life Care Demo Payer (UMA)					PCA, HHA, HSK, HCSS, COMP
Bauchmann Elizabeth DOB: XXXXX/XXXX	KHC-900022		Active	UMA healthcare	Default	05/19/2023	Life Care Demo Payer (KHC)	852-454-6361				PCA, HHA, RN, HSK, Other (Non Skilled), HMK

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## Validation steps

Work through the steps in order. Your PM will be there to help you find each screen.

### Step 4 – Spot-check 5 caregiver records

You don't need to review every patient record – that's not the goal of this step. Instead, select 5 patients you know well (or choose them at random) and confirm that the key information appears correctly in HHAExchange. Open each record and review the details below.

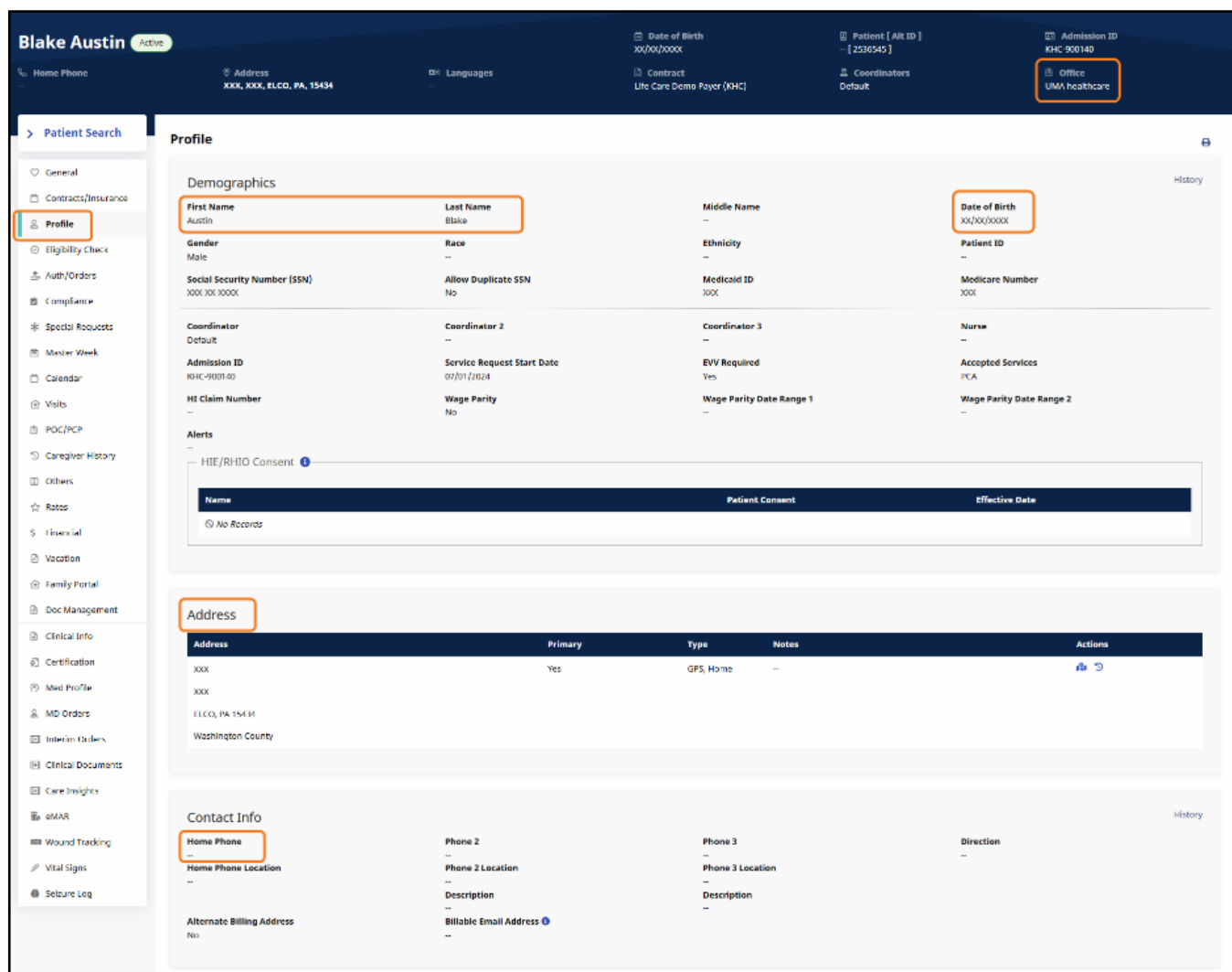
✓	What to check	What you're looking for	Pass when...
4a <input type="checkbox"/>	Click on a patient's name to open the patient record. Next, click <b>Profile</b> to review their demographics.	Their name, date of birth, address, and phone number are visible on the profile.	All required are populated.
4b <input type="checkbox"/>	Compare the address and phone to what you sent us (or what you know to be current).	The data matches your records – minor formatting differences are fine.	The data matches your records.
4c <input type="checkbox"/>	Confirm the patient is assigned to the correct office.	If you have multiple offices, the patient shows up under the right one.	The patient is assigned to the correct office.
4d <input type="checkbox"/>	Repeat the above steps for 4 additional patients.	Pick a mix – different acuity levels, different offices if applicable, different intake dates.	All 5 patient records pass the same checks.

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**Blake Austin** Active

Home Phone: XXX, XXX, ELCO, PA, 15434 | Address: XXX, XXX, ELCO, PA, 15434 | Languages: -- | Date of Birth: XX/XX/XXXX | Patient [Alt ID]: [2536545] | Admission ID: KHC-900140 | Office: UMY healthcare

Contract: Life Care Demo Payer (KHC) | Coordinators: Default

**Patient Search**

- General
- Contracts/Insurance
- Profile**
- Eligibility Check
- Auth/Orders
- Compliance
- Special Requests
- Master Week
- Calendar
- Visits
- POC/PCP
- Caregiver History
- Others
- Rates
- Timesheet
- Vacation
- Family Portal
- Doc Management
- Clinical Info
- Certification
- Med Profile
- MD Orders
- Interim Orders
- Clinical Documents
- Care Insights
- eMAR
- Wound Tracking
- Vital Signs
- Seizure Log

**Profile**

**Demographics**

<b>First Name</b> Austin	<b>Last Name</b> Blake	<b>Middle Name</b> --	<b>Date of Birth</b> XX/XX/XXXX
<b>Gender</b> Male	<b>Race</b> --	<b>Ethnicity</b> --	<b>Patient ID</b> --
<b>Social Security Number (SSN)</b> XXX-XX-XXXX	<b>Allow Duplicate SSN</b> No	<b>Medicaid ID</b> XXX	<b>Medicare Number</b> XXX
<b>Coordinator</b> Default	<b>Coordinator 2</b> --	<b>Coordinator 3</b> --	<b>Nurse</b> --
<b>Admission ID</b> KHC-900140	<b>Service Request Start Date</b> 01/01/2024	<b>EVV Required</b> Yes	<b>Accepted Services</b> PCA
<b>HI Claim Number</b> --	<b>Wage Parity</b> No	<b>Wage Parity Date Range 1</b> --	<b>Wage Parity Date Range 2</b> --

**Alerts**

HIE/RHIO Consent

Name	Patient Consent	Effective Date
No Records		

**Address**

Address	Primary	Type	Notes	Actions
XXX XXX ELCO, PA 15434 Washington County	Yes	GPS, Home	--	

**Contact Info**

<b>Home Phone</b> --	<b>Phone 2</b> --	<b>Phone 3</b> --	<b>Direction</b> --
<b>Home Phone Location</b> --	<b>Phone 2 Location</b> --	<b>Phone 3 Location</b> --	
	<b>Description</b> --	<b>Description</b> --	

**Alternate Billing Address**  
No

**Billable Email Address**  
--

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### Step 5 – Take a quick scan of the full record list for any unexpected

Return to the Search Caregiver and Search Patient screens to review the full lists without opening individual records. This is a high-level scan to catch anything that looks unusual, such as duplicate names, unfamiliar records, or records that appear in the wrong category.

- Do you recognize the names you see at the top of the list?
- Are there any obvious duplicates (same person showing up twice)?
- Are there any names that don't belong (e.g., a former employee, a patient who discharged a long time ago)?

Your **PM has already confirmed** the record counts match between the data you submitted and what appears in the portal. You do not need to count records manually – simply review the list for anything that looks unexpected.

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## Frequently asked questions

Work through the steps in order. Your PM will be there to help you find each screen.

### Step 6 – Sign off (or flag issues)

If everything looks good, let your PM know – they'll mark this step complete and you're ready for the next part of your implementation.

If anything came up during the spot-check, walk through it with your PM now so we can fix it before moving on.

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## Quick reference card

If you want a pocket-sized version of the process, use the checklist below.

### Validation in 5

1. Search your caregiver list.
2. Spot-check 5 caregiver records.
3. Search your patient list.
4. Spot-check 5 patient records.
5. Return to the search screens and review both lists for anything unexpected.

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### ➤ Why only 5 records? I'd rather check them all.

You're welcome to check more if you'd like. We start with 5 because experience shows it catches issues quickly without taking your whole day. If anything turns up in the first 5, your PM will work with you to look more broadly.

### ➤ What if I find something wrong?

Tell your PM. We'll fix it together — either in the moment or by re-loading affected records. This step exists specifically to catch and fix issues.

### ➤ Do I need to do this every time data is loaded?

No. This is a one-time check during your initial onboarding. Once you're live in HHAExchange, future updates to your data follow your normal workflows in the portal.

### ➤ Can someone else on my team do this validation?

Absolutely — anyone on your team who knows your caregivers and patients well can run this. We just need someone with eyes on the data.

### ➤ What if my address or phone format looks slightly different in HHAExchange?

Minor formatting differences ("St" vs "Street", area code parentheses, etc.) are normal and not a problem. Only flag it if the actual values don't match — for example, a wrong street number or a transposed phone digit.