Getting Started: Caregiver Readiness Checklist

Use this checklist to give caregivers the tools to confidently perform EVV.

1. Complete Caregiver Mobile App Registration & Setup

Purpose: Ensures the caregiver is registered and linked to your agency using a Mobile ID so EVV visits are captured correctly.

Ensure Caregivers have:

☐ Downloaded the **HHAeXchange Mobile App**, **registered** and **logged in**
☐ Provided you (Agency) with their **Mobile ID after registration**

Agencies:

☐ Open the **Caregiver profile** and select **Edit**
☐ In the **Caregiver Mobile App Settings,** enter the **Mobile ID** under **Caregiver Mobile/Portal ID field**
☐ Select **Mobile/Portal ID Type: Non-Clinical**
☐ Select **Save**

2. Confirm Caregiver Readiness

Purpose: Preparing caregivers before their first visit prevents failed clock-ins, missing EVV data, and last-minute troubleshooting.

☐ Caregiver has **access** to a **smartphone**
☐ Mobile App **registration** is complete
☐ Caregiver **can see scheduled visits** in the app
☐ **IVR PIN** and **phone number** provided (if applicable)

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3. Validate EVV Accuracy

Purpose: Accurate clock-in and clock-out behavior confirms service delivery and prevents time- and location-based EVV exceptions.

☐ **Clock-in** and **clock-out** captured at the correct location
☐ No **EVV exceptions** caused by setup issues
☐ **Offline Mode** and **IVR options** confirmed if needed

4. Continue Your Learning (Next Step)

Purpose: Strengthening visit review and maintenance skills ensures EVV issues are resolved early—before billing and payroll are impacted.

☐ Attend the **Visit Verification** & **Visit Maintenance Webinar**
☐ Learn how to **review visits**, **resolve exceptions**, and **prepare visits** for billing
☐ Apply **visit maintenance** best practices to reduce rework and EVV errors

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Explore the resources below to strengthen your knowledge and put the webinar concepts into practice!

Knowledge Base:

- Mobile Videos
- Getting Started Videos
- Mobile Topics

Training Videos:

- EVV Overview
- How to Enable Mobile App Access
- How to Clock In and Clock Out of the HHAeXchange+ Mobile App
- How to Reset and Use Offline PIN in the HHAeXchange+ Mobile App
- How to Clock In and Out for a Scheduled Visit (HHAeXchange App)
- Download Sign Up and Register for Mobile Access (HHAeXchange App)
- How to Locate Time & Attendance PIN
- How to Save the IVR Phone #
- How to Clock In and Out via IVR

eLearning:

- HHAeXchange Enterprise Training: Caregiver