

Getting Started: Caregiver Readiness Checklist

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



1. Enable Mobile App Access ○

Purpose: Proper Mobile App setup ensures EVV data links to scheduled visits and prevents exceptions caused by missing or incorrect Mobile IDs.

- Open the **caregiver profile**
- Locate the **Caregiver Mobile App** section
- Enter the **Mobile ID**
- Select **Mobile/Portal ID Type: Non-Clinical**
- Save** profile updates



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)



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

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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](#)