

Getting Started: Operational Readiness Checklist

Use this checklist to prepare schedules and caregivers for accurate EVV.



1. Patient Setup



Purpose: Create a patient profile to schedule recurring visits on a calendar for easy access.

- Enter internal / non-linked patients
- Assign contracts
 - Include **Alternate Patient ID**
- Enter **authorizations**
 - Include **billing Dx Code**
- Add **POCs**



2. Caregiver Setup



Purpose: Create a caregiver profile to assign to patient recurring visits for EVV records and tracking

- Add **caregiver demographics**
- Add caregiver email and/or phone number
 - For Communication preferences

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3. Master Week (Recurring Visits) ○

Purpose: Master Week creates consistency, reduces missed visits, and prevents EVV errors caused by incomplete or inconsistent scheduling.

- Navigate to **Master Week**
- Create the **recurring schedule**
- Save and select **Update Calendar**
- Confirm visits **populate correctly**



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:

- [Schedule Overview & EVV Management](#)
- [Schedule Types](#)
- [Getting Started Videos](#)
- [Caregiver Topics | HHAExchange Knowledge Base](#)
- [Patient Topics | HHAExchange Knowledge Base](#)



Training Videos:

- [Manage Schedules](#)
- [How to Create an Individual Visit](#)
- [How to Create a Master Week](#)
- [EVV Overview](#)
- [How to Add a Patient](#)
- [How to add an Authorization to a Patient](#)
- [How To Add a Plan of Care](#)
- [How To Assign a Coordinator](#)
- [How to Associate a Contract to a Patient](#)
- [How to Edit Member Information](#)
- [How to Set Up a Caregiver](#)
- [How to Run List of Caregivers Report](#)
- [How to Add Preference and Availability to Caregivers](#)

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eLearning:

- [HHAeXchange Enterprise Training: Caregiver](#)
- [HHAeXchange Enterprise Training: Scheduling](#)
- [HHAeXchange Enterprise Training: Patient](#)