

Getting Started: System & Configuration Foundations

Use this checklist to ensure your system is ready before scheduling, EVV, billing, or payroll begins.



1. User & Access Setup



Purpose: Ensures staff have the correct access to perform their responsibilities, preventing permission issues and workflow delays.

- ☐ Review existing users for **accuracy**
- ☐ Create **new users** and **assign** the correct role
- ☐ **Assign users** to the **appropriate** office(s)
- ☐ Confirm **permissions** match **job responsibilities**
- ☐ Reset or update **passwords** if needed



2. Agency Profile Configuration



Purpose: Defines agency-level defaults that impact EVV, communication settings, and downstream workflows.

- ☐ Review agency **demographics** and **identifiers**
- ☐ Confirm **IVR phone numbers** are correct
- ☐ Verify **language** and **communication** preferences
- ☐ Review **default system settings** that impact visits and EVV
- ☐ Save **changes** and **confirm** they apply correctly



3. Coordinator Setup



Purpose: Supports accurate scheduling visibility, documentation, and billing workflows.

- ☐ Confirm **coordinators** exist as system users
- ☐ **Create** or **update** coordinator profiles
- ☐ Assign **coordinators** to the **correct office(s)**

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4. Office Setup Essentials



Purpose: Rejecting incorrect or unusable EVV prevents inaccurate data from impacting visits, billing, and compliance reporting.

- ☐ Review **existing office profiles**
- ☐ Create **new offices** if needed
- ☐ Confirm the **correct time zone**
- ☐ Review **EVV** and **Mobile App** settings
- ☐ Verify **users and contracts** are assigned to the **correct office**



5. Payer & Contract Setup



Purpose: Final validation ensures visits are complete, accurate, and ready for downstream billing and payroll processes.

- ☐ Create or review **payer records**
- ☐ Set up contracts **before** scheduling begins
- ☐ Select **POC Duty Compliance** prior to saving
- ☐ Assign contracts to the **correct office(s)**
- ☐ Review **authorization** and **timesheet** options



6. Reference Tables & Service Codes



Purpose: Determines which services and options are available throughout the system.

- ☐ Create **service codes** in **Reference Table Management**
- ☐ Confirm **service codes** are **active**
- ☐ Link **required export codes**
- ☐ Assign **billing rates** within **contracts**
- ☐ Confirm **services** appear correctly in **scheduling**

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7. Payroll Foundations



Purpose: Ensures visits can flow smoothly into payroll processing.

- ☐ Create **pay codes** in **Reference Tables**
- ☐ Assign **pay rates** in **Payroll Setup**
- ☐ Review **effective dates** for **accuracy**
- ☐ Confirm **pay codes** are available for **scheduling**
- ☐ Validate **optional holiday** or **special pay rates**



8. Final Readiness Check & Next Steps



Purpose: Confirms all foundational setup is complete before live scheduling and EVV execution.

- ☐ Confirm **users, offices, and agency settings** are fully configured
- ☐ Verify **coordinators, contracts, services, and reference tables** are **correct**
- ☐ Ensure **payroll foundations** are in place before visits begin
- ☐ Attend the **Scheduling & EVV Setup Webinar** to move into live workflows

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



Knowledge Base:

- [Admin Setting Videos](#)
- [Admin Setting Overview](#)



Training Videos:

- [Create a New User](#)
- [User Management](#)
- [Agency Profile](#)
- [Coordinator Setup](#)
- [Office Setup](#)
- [Creating New Contract](#)
- [Contract Setup](#)
- [Reference Table Management](#)
- [Contract Service Codes](#)
- [Pay Codes](#)



eLearning:

- [HHAeXchange Enterprise Training: Agency Setup](#)