

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](#)