

Getting Started: Visit Readiness Checklist

Use this checklist to review, correct, and prepare visits for accurate billing and EVV compliance.



1. Search for Visits in Visit Maintenance



Purpose: Consistent visit review helps identify EVV issues early, prevents billing delays, and reduces last-minute corrections.

- Review visits daily using **Visit Statuses**
- Use statuses such as **Missing Clock In** to identify caregivers who missed EVV
- Use **Visit Status: Complete** to review fully completed visits
- Use **Visit State: Incomplete** to identify visits that require maintenance



2. Link EVV to Scheduled Visits



Purpose: Linking EVV confirms the caregiver's clock-in and clock-out times match the scheduled visit and allows the visit to validate for billing.

- Review visits with **Suggested EVV Confirmation** icons
- Verify EVV clock-in and clock-out times
- Link EVV when it is valid
- Reject EVV when it is invalid
- Manually confirm visits when EVV is invalid but the visit occurred

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3. Reject Invalid EVV Attempts ○

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

- Review EVV Attempts daily
- Identify and reject EVV attempts that are invalid



4. Final Visit Validation ○

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

- All valid EVV is linked or confirmed
- Invalid EVV is rejected
- No unresolved visit exceptions remain
- Visits display as **Complete** and billing ready



5. Completing Visit Maintenance ○

Purpose: Now that Visit Verification and Maintenance are complete, you are ready to move on to Billing.

- Attend the upcoming Billing webinar
- Learn how to review visits to ensure they are ready to be billed
- Prepare for billing by clearing prebilling

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



Knowledge Base:

- [Visit Maintenance Feature](#)



Training Videos:

- [Visit Maintenance Overview](#)
- [Visit Maintenance Linking EVV](#)
- [Visit Maintenance Manual Visit Confirmation](#)



eLearning:

- [HHAExchange Enterprise Training: Visit Maintenance](#)