



# HHAEExchange Quick Guide Packet

## Objective

The purpose of this packet is to help you complete key tasks within the HHAEExchange mobile app.

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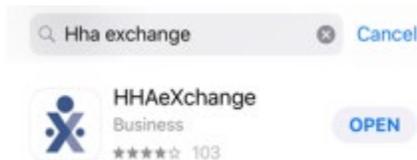
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## HHAeXchange: Downloading the HHAeXchange Mobile App

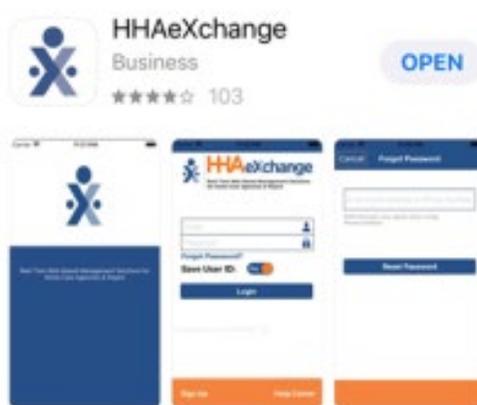
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**OBJECTIVE:** This article provides information about downloading the HHAeXchange mobile app from either App Store/Google Play Store.

1. The HHAeXchange Caregiver Mobile App is available for download through the App Store or Google Play for either iPhone or Android devices.
2. To locate and download the App, enter the keyword **HHA Exchange** in the search bar of the App Store or Google Play.



3. Select the HHAeXchange app and download and launch the app.



**NOTE:** A prompt to enable Location Services will pop up. Location settings are required in order to complete a visit. Note that GPS is only used by the app at two points: when you Clock In, and when you Clock Out. Tap **Allow** or enable Location Services in your phone's app settings

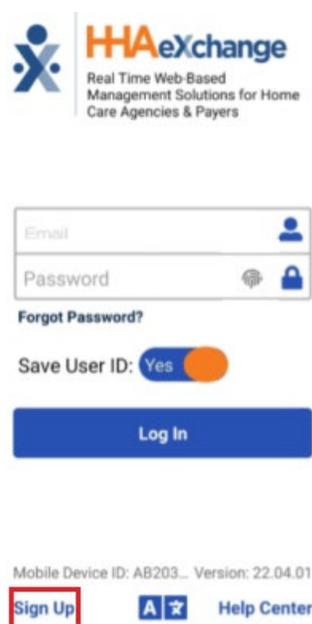
## HHAEExchange: Setting up the HHAEExchange Mobile App for the first time

**OBJECTIVE:** This article provides information about logging into the HHAEExchange mobile app for the first time.

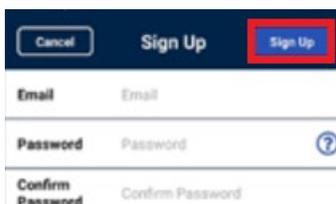
1. Once the HHAEExchange mobile is downloaded onto your device go ahead and open the app. When the app is first opened, you will be prompted to select a preferred language for the app to display in.



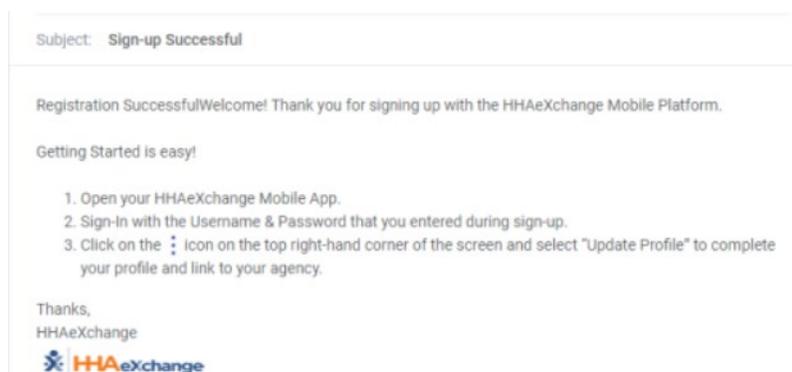
2. Press on the **Sign Up** button on the bottom left of the main screen.



- The app will prompt you to create your credentials by entering your **Email Address** and creating a **Password(minimum of 8 letters, 1 capital letter, and 1 number)**
- Once complete entering in your **Email Address** and **Password** press on the “**Sign Up**” button on the top right of the screen.



- Check your **Email** for a verification email that is sent by HHAExchange that will provide next steps for you to complete. It would look very similar to the screenshot below.

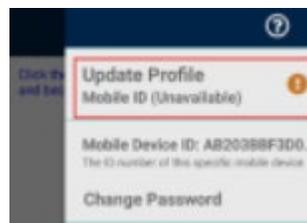


- Once you have received the Verification email from HHAExchange, open your HHAExchange mobile application and log in using your newly set up log in credentials.
- A **Terms of User Agreement** will appear, go ahead and press on **Terms Accepted**.

I agree to the [Terms of Use](#), [Privacy Policy](#) and [EULA](#).

**Terms Accepted**

- Once on the Main Screen, click on the **Three-Dot Icon** located on the top right of the screen and tap on the **Update Profile**. This step is the 2<sup>nd</sup> step of the Verification email that was sent out.



- Complete all the fields on the **Create Profile** page. Tap **Create** to create the Profile.

Create Profile	
First Name	First Name
Last Name	Last Name
Last 4 SSN	Last 4 SSN 
Gender	Gender
Birthday	MM/DD/YYYY

- When you have entered all you information correctly a message will appear containing a **Mobile ID**.

Create Profile	
First Name	John
Last Name	Smith
Last 4 SSN	9802 
Gender	Male
Birthday	09/13/1973

You have been registered successfully. Your Mobile ID Number is **1628416** and a copy has been emailed to you. ~~This number~~ should be provided to your agency in order to be linked with them.

OK

11. HHAX sends a second email after successful registration. This message contains the **Mobile ID** as well as instructions on how to log in and use the Caregiver Mobile App:

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Subject: Registration Successful

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Registration Successful

Dear **John Smith**

Your HHAeXchange Mobile App has been registered!

Complete these final step to link to your agency and start using the app!

1. Provide your unique Mobile ID #: **1629416** to your Agency
2. Open the HHAeXchange Mobile App.
3. Sign-In with the Username & Password that you entered during sign-up.
4. Once your agency activates your Mobile App profile in their systems, you will see Patient and Visit information in your Mobile App!

**Note:** If you work for more than one Agency using HHAeXchange, you can provide the same Mobile ID to each of them.

Thanks!

HHAeXchange

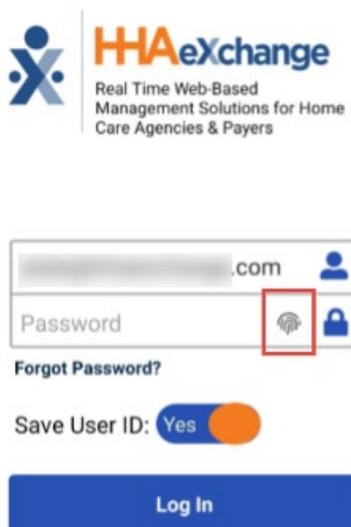


## HHaEXchange: Managing Face ID and Touch ID in the Mobile App

**OBJECTIVE:** This article provides information about managing the Face ID and Touch ID within the HHaEXchange mobile app.

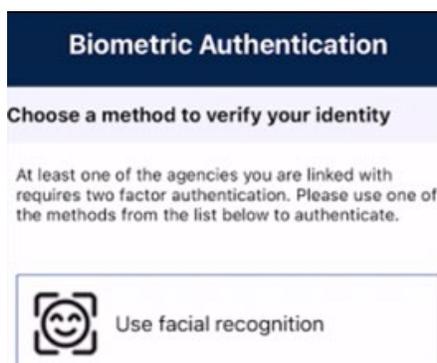
**Note:** Face ID or Touch ID depend on which options are possible and enabled on your mobile device. If you have not already, you will need to turn these options on in your device settings in order to use on the HHaEXchange Mobile app.

- For the Biometric Login option to become available, the user must have logged in to the Mobile Application using Email and Password and logged out at least one time. When the Biometric Login option is available, the fingerprint icon at the right of the Password field is displayed.

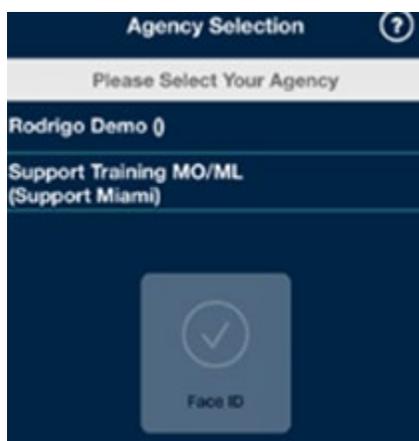


**Note:** If the Agency requires Two Factor Authentication, the user must also provide a password on the log in page before tapping the fingerprint icon. After providing a matching fingerprint or facial scan, the user is allowed to the Caregiver Mobile App.

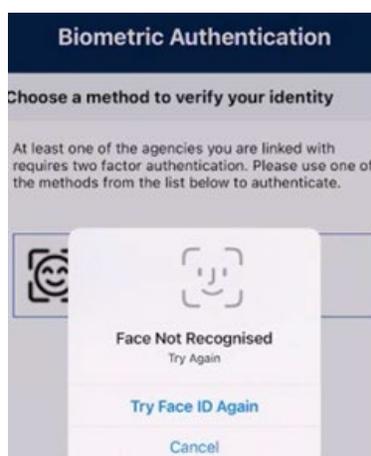
1. When facial recognition is required for authentication, the image below is displayed.



2. When facial recognition is successfully confirmed, the mobile app will let you know that the facial recognition was successful and lets the user log in.



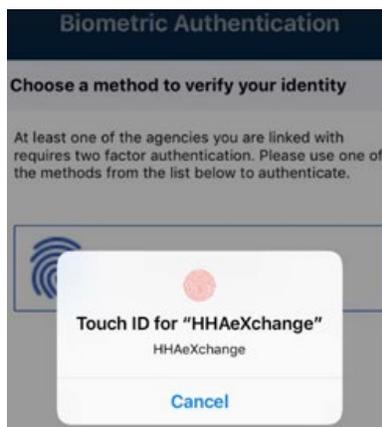
3. If facial recognition is not successful, the app will prompt the user to retry.



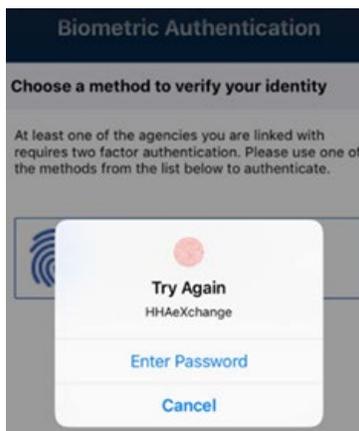
4. When fingerprint recognition is required for authentication, the initial screen prompts the user to press on the **Use your fingerprint** box.



5. The next screen prompts the user to perform the **Touch ID for HH AeXchange** and lets the user log in once completed successfully.

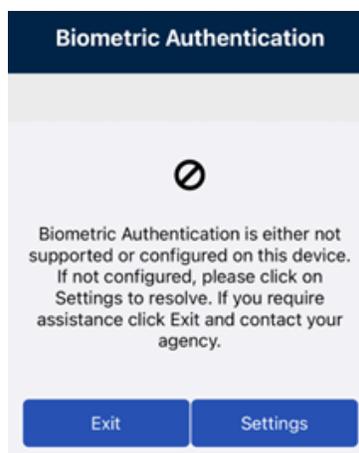


6. If the **Touch ID authentication cannot be verified**, the device will prompt the user to retry the fingerprint authentication.



**Important:** If the user changes their password or uses the **Forgot Password?** function, the Biometric Login option is reset. The user must log in to the Mobile App using their **Email** and **Password** and log out at least one time before the Biometric Login becomes available again.

7. If the device is either not configured or **does not support Touch ID or Face ID**, the app prompts the user to act. Tap on **Settings** to configure the feature or tap **Exit** to return to the app.



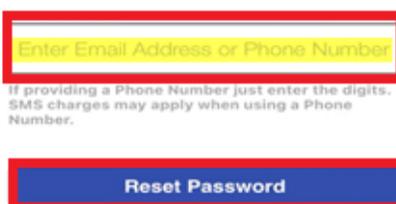
## HHAExchange: Resetting Password in the Mobile App

**OBJECTIVE:** This article provides information about resetting your password within the HHAExchange mobile app.

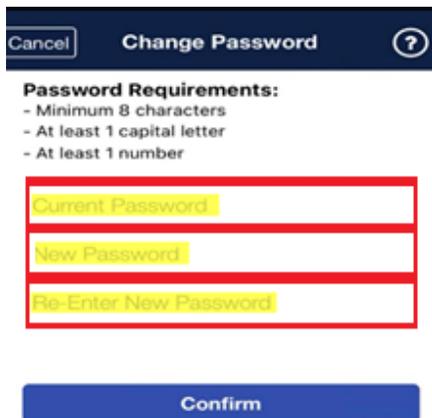
1. On the main Login Screen press on the **Forgot Password?** Option below your password section.



2. Enter the **Email Address** or **Phone Number** associated with the account. Once entered tap on the **Reset Password** button. You will receive a temporary password to the option chosen.



- The app prompts the Caregiver to enter the **Current Password** (enter the Temporary Password received), a **New Password**, and **Re-Enter New Password** (to confirm). When done tap on the “**Confirm**” button and log in to the app.



Cancel Change Password ?

**Password Requirements:**

- Minimum 8 characters
- At least 1 capital letter
- At least 1 number

Current Password

New Password

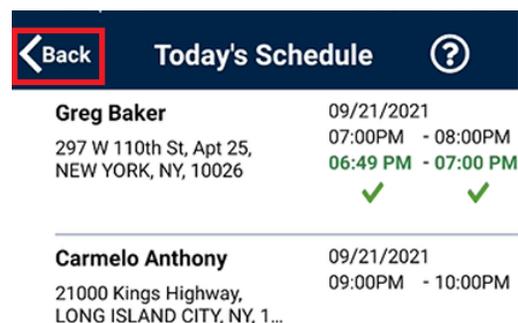
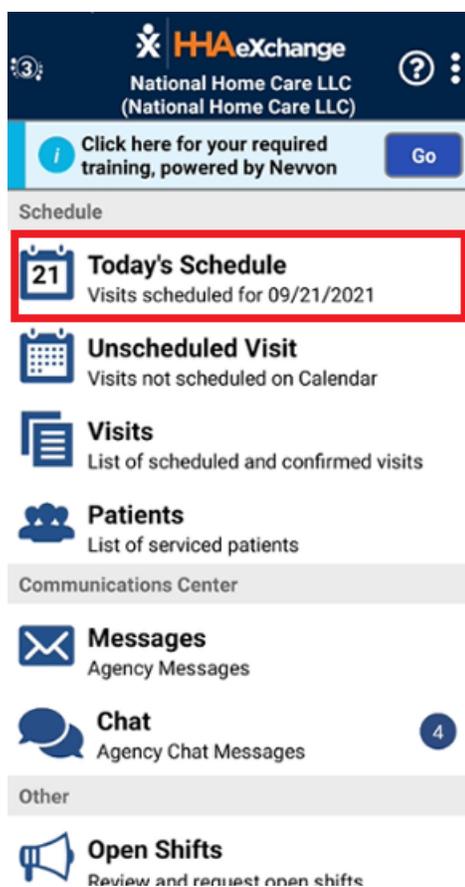
Re-Enter New Password

Confirm

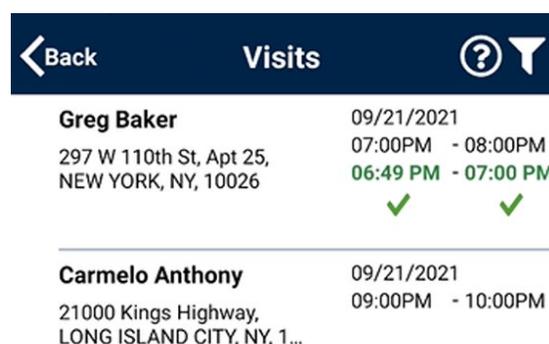
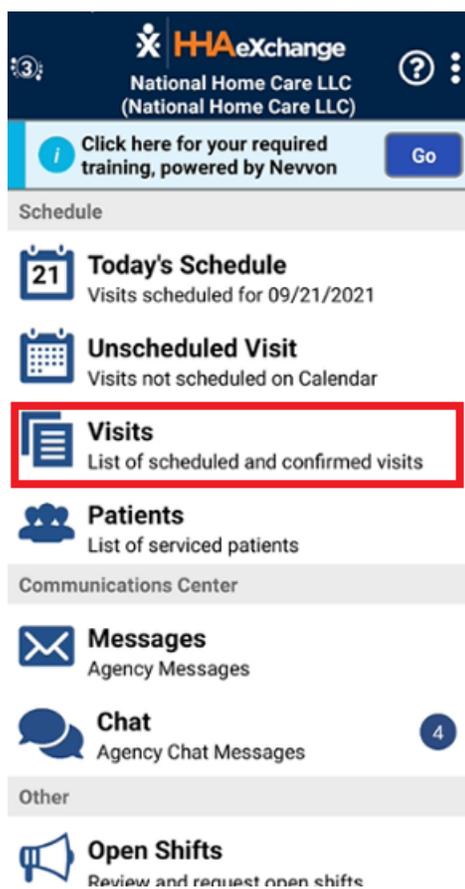
## HHaExchange: Viewing Scheduled Visits

**OBJECTIVE:** This article provides information on how to view your Scheduled Visits within the HHaExchange mobile app.

1. Open the **HHaExchange App**
2. **Login** using your email and password or Face ID/Touch ID.
3. In the Main screen you will see the option for **Today's Schedule** and **Visits**. Tap on **Today's Schedule** and you will see visits for the current day.



- If you press on the “<Back” icon on the top left of the screen it will take you back to the main screen. From here you can tap on the option for “Visits” this will take you to see the scheduled visits for up to two weeks in advance.



## HHaEXchange: Clocking In and Out of a Scheduled Visit

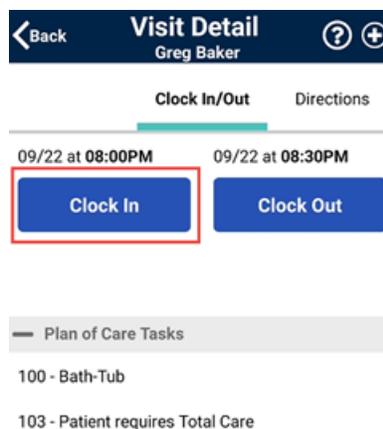
**OBJECTIVE:** This article provides information about clocking in and clocking out from a visit within the HHaEXchange mobile app.

### Clocking In

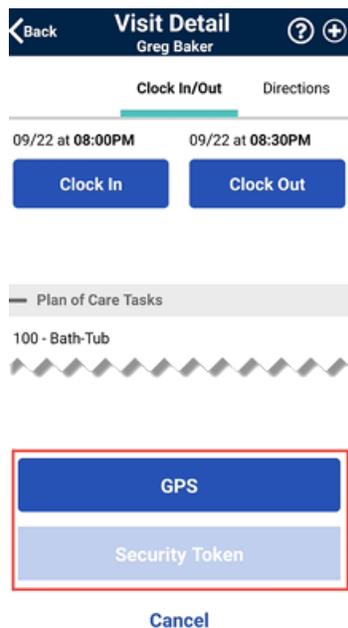
1. Open the **HHaEXchange App**
2. **Login** using your email and password or Face ID/Touch ID.
3. In the Main screen tap on **Today's Schedule** and locate your visit for today.



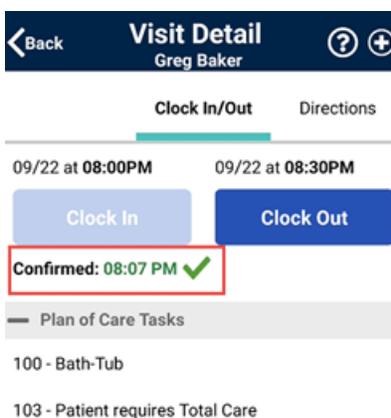
4. Once in the **Visit Details** you will see the **Clock In** and **Clock Out**, tap on the blue button **Clock In**.



- Select either the **GPS** or **Security Token (FOB Device)** to submit an EVV.

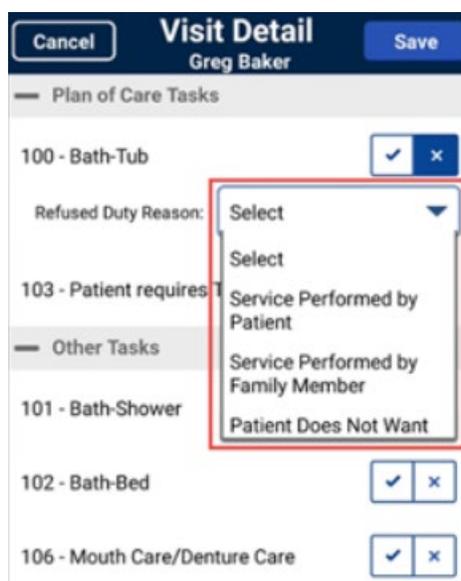


- When a successful EVV placement takes place, you will see your Clock In time in green under the Clock In button. If an unsuccessful EVV placement takes place you will see the clock in time in red under the Clock In button.



## Clocking Out

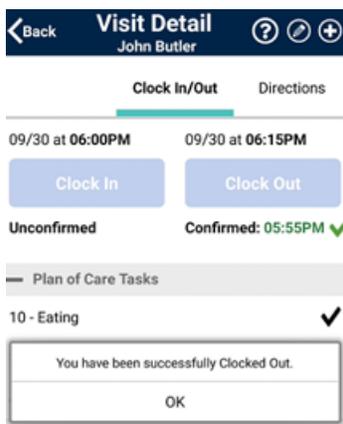
1. When a visit is completed and you are ready to clock out, tap on the visit from **Today's Visit** and tap on **Clock Out**. This will prompt you to select duties performed from a Plan of Care (POC) if one was included.
2. If a duty was performed, you can select the **Checkmark icon**. If a duty was refused you can select the **X icon**. In addition to selecting the X icon for refused duties, you will also have to select an option from the **Refused Duty Reason**. Once complete hit **Save** on the too right of the screen.



3. If a **Patient Signature** is required you will need to obtain it before being able to clock out from the visit. Once obtained tap on the Save button on the bottom right of the screen. This will take you back to the Visit details main page.



4. Tap on the **OK** button to go back to the home screen of the mobile app.

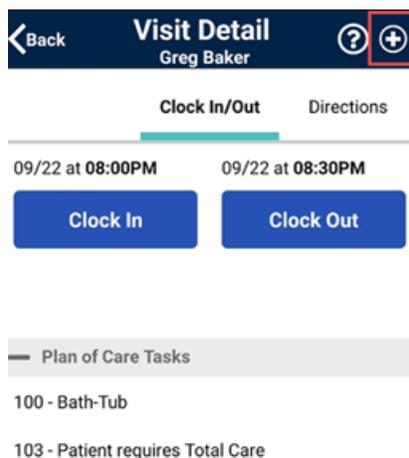


## HHaExchange: Adding a Visit Note in the Mobile App

**OBJECTIVE:** This article provides information about adding a Visit Note within a visit on the HHaExchange mobile app.

**NOTE:** Visit notes can be entered during and after a visit.

1. Open the **HHaExchange App**
2. **Login** using your email and password or Face ID/Touch ID.
3. In the Main screen tap on **Today's Schedule** and locate your visit for today.
4. From the Visit Details page, you can tap on the circle plus icon on the top right of the screen.



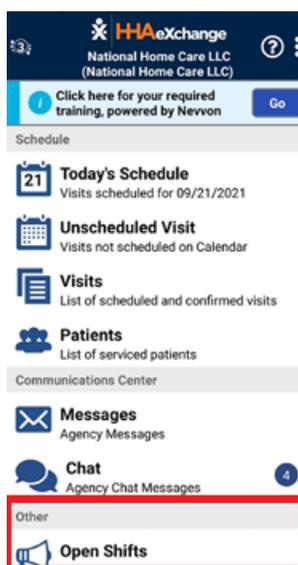
5. The drop down will provide different options for a Note Type, select the type that best fits your situation. Once a Note I created it can be reviewed on the Notes tab on the Visit Detail page. A note cannot be edited or deleted once created.



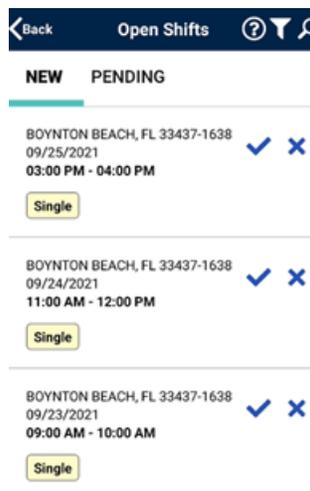
## HHAEExchange: Managing Open Shifts

**OBJECTIVE:** This article provides information about Open Shifts and how to manage them within the HHAEExchange mobile app.

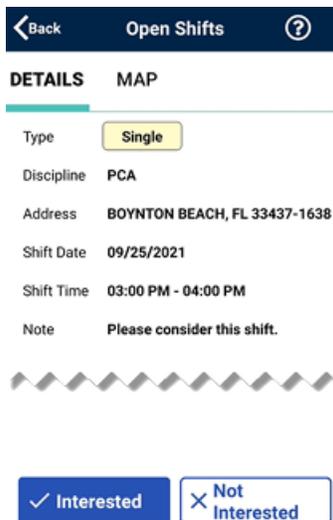
1. Open the **HHAEExchange App**
2. **Login** using your email and password or Face ID/Touch ID.
3. In the Main screen tap on **Open Shifts**.



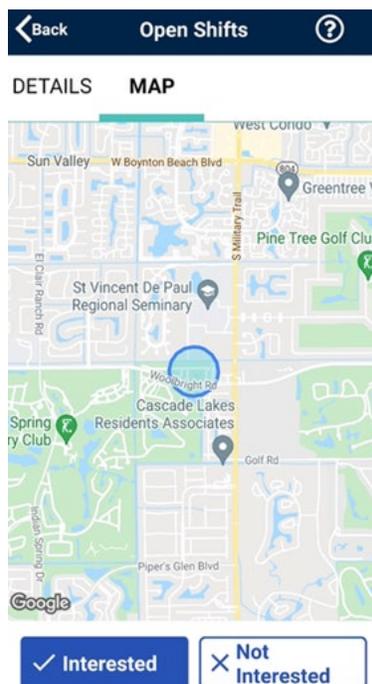
4. The **Open Shifts** screen will display all the broadcast shifts on the **New** tab. From here you will see if a visit is **Single** or **Permanent**.



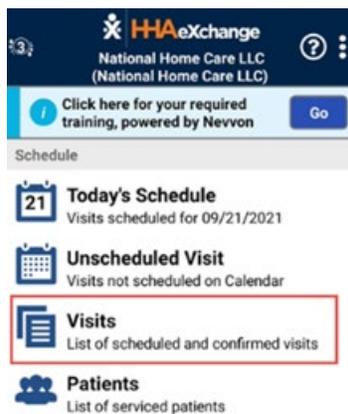
- Once you have tapped on a visit of interest, the **Details** tab will open that will provide the basic information for the visit. From this screen you can tap on **Interested** or **Not Interested**.



- The **Map** tab will allow you to see the general vicinity (this will include City, State and Zip Code) of where the client lives using Google maps. If you are assigned to the visit the actual Patient address will be available to you.



7. If you have a shift that has been assigned to you, the visit will be moved to the **Visits** section and the Caregiver is also alerted of this.



**NOTE:** Expressing interest on an Open Shift does not mean that a caregiver is automatically given the shift. The shifts must be assigned by the Agency's Coordinator. Only then does a Caregiver receive an alert, and the shift appears as a scheduled Visit on their Mobile App.

## HHAEExchange: Managing Offline Mode

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**OBJECTIVE:** This article provides information about Offline Mode and how to manage it within the HHAEExchange mobile app.

- Offline Mode allows for Caregivers to use the HHAEExchange Mobile App in areas with no internet connectivity; later to synchronize when connected back to an internet connection.
- What can you do while on Offline Mode?
  - Access Today's Schedule page
  - Clock In/Out from a visit
  - Enter Duties for the visit
  - Obtain Client Signature
- What can I not do while on Offline Mode?
  - Check My Availability
  - View Open Shift page
  - Check for Messages
  - View any Patients
  - View Sign Up page
  - Access Forgot Password or Change password options
  - Change Language
  - Change Agencies
  - Access Notes
  - View Care Insights
  - Make any Time Edit requests
  - You will also receive the following screen:

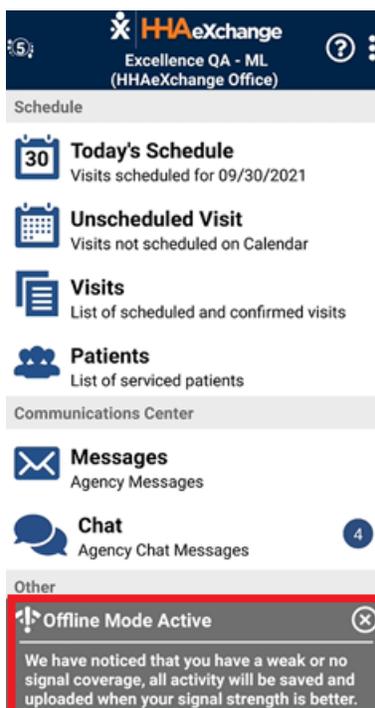
### Network Notice



You must be connected to the  
Internet to perform this function.  
Please try again later.

Return Home

- When does Offline Mode data synchronize with the HHAX system?
  - The Caregiver must be online with a valid internet connection and complete the following actions:
    - Log In to mobile app
    - Switch Agencies
    - Change Language
  
- How do I know when I am on Offline Mode?
  - The only indicator you will see that notifies the Caregiver is on Offline Mode is the Offline Mode Active message alert that will appear on the bottom of the Home Screen.



## HHAeXchange: Managing IVR

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**OBJECTIVE:** This article provides information about the new numbers used to complete IVR.

- There are four new numbers that are set up for IVR:

IVR Language	Phone Number
English	800-717-0617
Spanish	800-717-5793
Russian	833-599-5657
Mandarin	833-603-0574

- The process to complete a visit through IVR is the same.