Electronic Visit Verification (EVV) Training

Dear caregiver,

Please be advised that the New York State Department of Health (the "Department") requires CDPAP fiscal intermediaries to provide all direct care workers with annual EVV training. To satisfy this requirement, Magic Home Care is providing you with this letter, which explains in detail the EVV process and your role in it. Please note that most of this information is also available at the Department's EVV website, at https://www.health.ny.gov/health_care/medicaid/redesign/evv/index.htm. To find specific information contained in this training on the EVV website, consult the endnotes herein. Should you have any questions or concerns about any information in this EVV training, please contact Magic Home Care by calling (718) 484-4900 or sending an e-mail to eddiez@magichcny.com. Alternatively, you may contact the Department directly with any inquiries by sending an e-mail to EVVHelp@Health.NY.Gov.

What is EVV?

EVV is the abbreviation for Electronic Visit Verification. EVV is a system that electronically verifies the occurrence of home care service visits, identifying the time that service provision begins and ends to ensure accurate claims disbursement and helping to ensure that consumers receive the expected care.[1] In order to be complete, submissions of EVV data must include the type of service provided, the names of the consumer and caregiver, the date of the visit, the beginning and end times of the visit, and the location of service delivery.[2] Effective January 1, 2021,[3] EVV is required for all Medicaid-funded personal care services that begin or end in the home, including all personal care services provided by consumer directed personal assistants ("PAs").[4] Therefore, clocking in/out electronically is the **only** acceptable method for PAs to confirm their hours worked and duties performed. PAs will have two EVV-compliant options for clocking in/out.

How is visit information verified using EVV?

To clock in and out, each caregiver may choose to:

(1) call in/out from the consumer's phone number, preferably a landline phone, if available; **OR**

(2) register visit times using the HHA Exchange GPS Enabled Caregiver Mobile App (caregivers who opt for this **will have to contact the Magic Home Care office** at (718) 484-4900 to have the process set up and explained further).

Caregivers who opt for **method 1** should call the Magic Home Care office at (718) 484-4900 to confirm their six-digit ID number, required to successfully register the calls. Once you have your ID number, you may begin calling in/out via method 1 immediately. Below is a step-by-step explanation of the call in/out process for method 1.

Calling in

1. At the beginning of your work shift, dial (855) 811-9694 or (718) 705-6208 to reach the English language line. For Russian, dial (855) 811-9695 or (718) 705-6209. **You must make this call from the consumer's phone**, **preferably the landline**.

2. Listen for the instructions given by the answering service. Dial "**1**" if you are beginning your shift. Then, dial your six-digit Magic Home Care ID number. The answering service will repeat the six-digit ID number that you dialed. Dial "**1**" to confirm that the ID number is correct. If you made a mistake, you may dial "**0**" and reenter your ID number when prompted.

3. The answering service should confirm that your call was successfully registered. After you hear the confirmation, you may end the call.

Calling out

1. At the end of your work shift, dial (855) 811-9694 or (718) 705-6208 to reach the English language line. For Russian, dial (855) 811-9695 or (718) 705-6209. **You must make this call from the consumer's phone**, **preferably the landline**.

2. Listen for the instructions given by the answering service. Dial "**2**" if you are concluding your shift. Then, dial your six-digit Magic Home Care ID number. The answering service will repeat the six-digit ID number that you dialed. Dial "**1**" to confirm that the ID number is correct. If you made a mistake, you may dial "**0**" and reenter your ID number when prompted.

3. When you are prompted to "enter your duty ID", dial "**000**".

4. The answering service should confirm that your call was successfully registered. After you hear the confirmation, you may end the call.

IMPORTANT: If you know or suspect that one or more of your calls did not complete properly, whether due to a technical issue or user error, it is your responsibility to notify your consumer and your coordinator at Magic Home Care immediately. Your coordinator can be reached by calling (718) 484-4900. **If one or more of your calls does not register with the EVV system**, **your payment for all affected shifts may be delayed until the conclusion of an investigation into the actual hours worked**.

Important information regarding visit scheduling: PAs will continue to be able to work flexible hours each week, as requested by the consumer. As always, **hours worked must not exceed the weekly authorized hours for the consumer**. If the total weekly hours registered with the EVV system exceed the weekly authorized hours for the consumer, payment for all affected shifts may be delayed until the conclusion of an investigation into the actual hours worked. If you know or suspect that your weekly visit hours logged with the EVV system exceed the total weekly hours authorized, you must notify your consumer and your coordinator at Magic Home Care immediately. Your coordinator can be reached by calling (718) 484-4900.

If you are unable to use the call in/out system (method 1) as described above, you must set up **method 2** by calling the Magic Home Care office at (718) 484-4900 to install the HHA Exchange GPS Enabled Caregiver Mobile App and synchronize your app with Magic Home Care's EVV system. Instructions for method 2 are included in this document, beginning on page 6.

What if there are multiple caregivers serving the same consumer, or multiple consumers being served by the same caregiver?

If multiple caregivers are working shifts for the same consumer, each caregiver should separately follow the above process for EVV, using either method 1 or method 2. Caregivers should take care that their visit hours do not overlap with the visit hours of any other caregivers working for the same consumer. If there is overlap between different caregivers' shifts for the same consumer in the EVV system, payment for all affected shifts may be delayed until the conclusion of an investigation into the actual hours worked. If you know or suspect that your visit hours logged with the EVV system overlap with another caregiver's visit hours, you must notify your consumer and your coordinator at Magic Home Care immediately. Your coordinator can be reached by calling (718) 484-4900.

If you are a caregiver serving multiple consumers, you must make sure that a complete, separate EVV record is created for each visit and for each consumer, using either method 1 or method 2. Make sure that you work only the authorized hours for each consumer, and that there is no overlap between different shifts worked. If you know or suspect that your visit hours logged with the EVV system for any of your shifts overlap with each other, you must notify your consumers and your coordinator at Magic Home Care immediately. Your coordinator can be reached by calling (718) 484-4900. If you are using method 1 for EVV, you may use the same phone number for multiple consumers **only if** they reside in the same location.

If you are working consecutive shifts for two consumers at the same location, you may only need to clock in and out once per day using EVV method 1. Clock in at the beginning of the first visit using the above instructions for **calling in**. At the end of the second visit, you may complete the EVV record by

clocking out of both shifts in the same call. To do this, follow steps **1.** Through **3.** in the instructions for **calling out**, but do not end the call. Repeat step **3.** one more time, then end the call.

How is visit information verified for live-in caregivers using EVV?

It is the policy of Magic Home Care to require the submission of EVV data from all PAs, including live-in caregivers. This policy improves the accuracy of reported visit times and increases the efficiency of processing visit information by maintaining a uniform process for data submission. For more information about the live-in caregiver designation, please visit the Department's EVV website.[5]

What happens if EVV data is missing or incomplete?

All home care visits must be verified by submitting complete EVV data using method 1 or method 2, as described above. However, on rare occasions, it is possible that technical problems with the EVV system or user error causes the EVV data to be missing or incomplete. Religious holidays or observances may also impact the use of technology in capturing EVV data.[6] When this happens, paper timesheets must be submitted for all affected visits. Paper timesheets can be obtained on the Magic Home Care website, at http://magichomecareny.com/forms/CDPAS-Timesheets.pdf, or by visiting our office. All information in the timesheet must be completed, including the names of the consumer and caregiver, the caregiver's identification number, the date of the visit, the beginning and end times of the visit, and the location of service delivery. A timesheet is not valid unless signed by the consumer and caregiver. Timesheets must only be used when complete EVV data cannot be submitted, for any of the reasons described above. Timesheets may be submitted to Magic Home Care by either the consumers or their caregivers. Caregivers who fail to submit complete EVV data overly frequently or without explanation may be subject to discipline from their consumers.

Medicaid beneficiaries/families

Consumers and their families should also be aware of EVV. Our office will communicate with consumers directly regarding EVV, but you should also be able to communicate the following. Consumers and their families should be informed that EVV is mandatory effective January 1, 2021, for all personal care services and consumer directed personal assistance services, and that it is mandatory effective January 1, 2023, for all home health services through Certified Home Health Care Agencies. EVV implementation does not affect the location, amount or type of services received. EVV will record the visit date, the start and end time, the type of service provided, the name of the caregiver and consumer, and the location of service for each visit. The location of service will be reported as either the word "home" or "community"; the Medicaid program will not collect information regarding consumers' addresses through EVV.

Consumers should know that EVV information will be recorded using a GPS-enabled mobile app or the consumer's telephone, usually a landline. The consumer's phone may only be used for EVV if the consumer allows the phone to be used by the caregiver. <u>EVV must be submitted by the caregiver for each visit; the consumer may not use EVV on the caregiver's behalf.</u> If consumers have any concerns about EVV, they may contact the Magic Home Care office directly, or they may contact their local Department of Social Services.

This information is contained in the EVV Fact Sheet for Medicaid Beneficiaries and Families, found on the Department's EVV website.[7]

Conclusion

Thank you for taking the time to review this EVV Training. If you intend to use method 2 for EVV, please also review the instructions for using the HHA Exchange GPS Enabled Caregiver Mobile App, beginning on page 6. Should you have any questions about EVV at any time, please feel free to contact us via the phone number or e-mail listed above.

Sincerely,

Magic Home Care Administration

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[1] https://www.health.ny.gov/health_care/medicaid/redesign/evv/index.htm, "What is EVV?"

[2] https://www.health.ny.gov/health_care/medicaid/redesign/evv/index.htm, "What is EVV?"

[3] https://www.health.ny.gov/health_care/medicaid/redesign/evv/index.htm, "21st Century Cures Act Requirements"

[4] https://www.health.ny.gov/health_care/medicaid/redesign/evv/repository/evv_prog_guidelines.htm#_bookmark9, "5.2 Required Programs"

[5] https://www.health.ny.gov/health_care/medicaid/redesign/evv/repository/evv_prog_guidelines.htm#_bookmark20, "5.12 Live-in Caregiver Exemption"

[6] https://www.health.ny.gov/health_care/medicaid/redesign/evv/repository/evv_prog_guidelines.htm#_bookmark18, "5.10 Manual/Paper Timesheet Entries"

[7] https://www.health.ny.gov/health_care/medicaid/fact_sheets/docs/evv/english.pdf, "EVV Fact Sheet for Medicaid Beneficiaries and Families"

Caregiver Mobile App

Downloading the App

The HHAeXchange Mobile App is available for download through the App Store or Google Play. The App is available for both iPhone and Android devices. To locate and download the App, enter the keyword **HHA Exchange** in the search bar of the App Store or Google Play (illustrated in the image).

Caregivers are responsible for downloading and installing the application on their personal mobile device. Once registered, Caregivers must provide credentials as well as ID numbers to the Agency for further setup and linking to the HHAX system.

HHAeXchange Mobile App

Signing Up and Registering

Creating an account for the Mobile App is a two-step process, as follows:

1. **Sign up** by creating login credentials.
2. **Register** by entering additional demographic information.

Sign Up

Once the App has downloaded, press **Sign Up** on the bottom left of the main screen. The App prompts for the following:

- An **Email Address**
- A **Password** (minimum of 8 letters, 1 capital, and 1 numeric value)

Once credentials are completed and confirmed, select **Sign Up** to log in to the App.
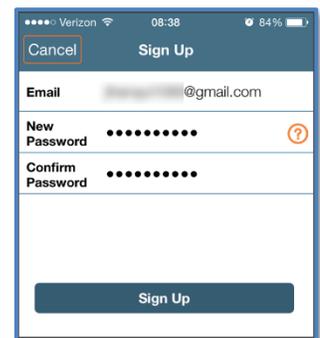
Sign Up Screen

Upon successfully creating an account, the system issues a verification email:
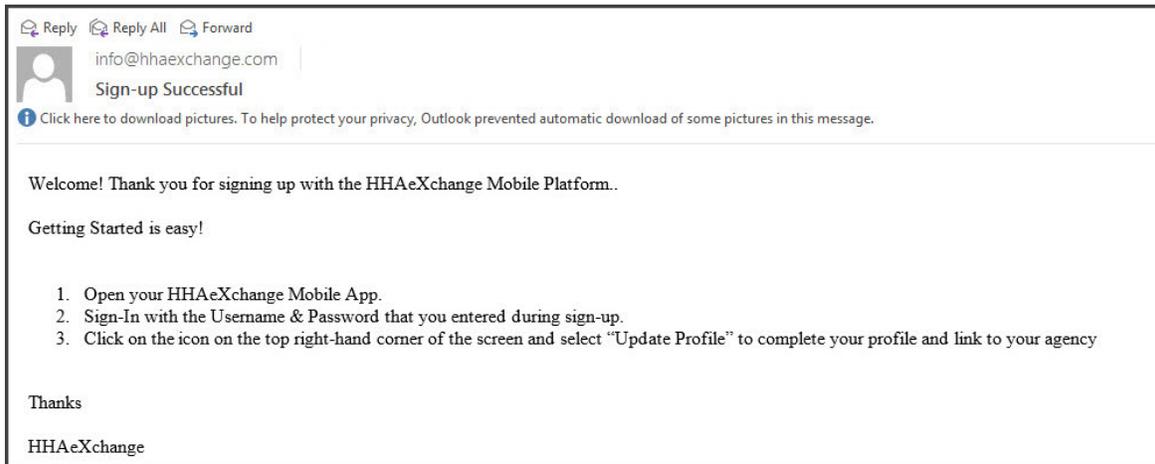
Successful Sign Up Email

Register

Follow the steps outlined below to register on the HHAX Mobile App.

Step	Action
1	Log in to the App upon receiving the verification email.
2	Review the *Terms of User Agreement* and select the **Agree** button.
3	The Main Screen opens. Click the **three-dot icon** (on the top-right corner) as prompted by the message. Select the **Update Profile** option.

Step	Action
4	Complete all the fields on the **Create Profile** page. Click the *Create* button to create the Profile. *Note: The values for **Last Name**, **Last 4 SSN**, **Gender**, and **Birthday** must match the information on record in HHAX. The Mobile App does not link correctly if any of these values does not match.*
5	If all the information is entered correctly, a message appears containing the **Mobile ID**.
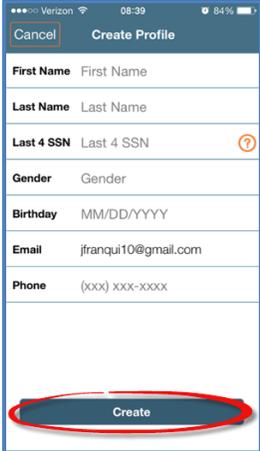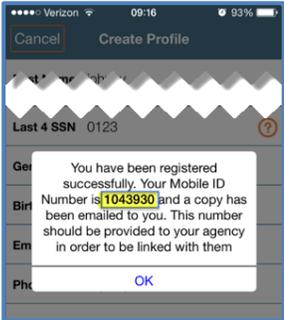
The HHAX system sends a second email after successful registration. This message contains the **Mobile ID** as well as instructions on how to log in and use the Mobile App:

Reply Reply All Forward

info@hhaexchange.com
Registration Successful

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Dear **Johnny Frank**

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 #: **1043649** 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

Successful Registration Email

Using the Mobile App

The Main Screen

Via the Mobile App Caregivers keep track of their schedule, receive and respond to messages from their Office/Agency, and Clock In and Out of a Visit.

The following sections provide descriptions and guidance on the various options on the Main Screen.

The Main Screen

Top Panel (1)

Clicking on the icon on the top panel to switch between Agencies/Offices the Caregiver is connected to. The Caregiver must provide every Agency/Office the **Mobile ID** for proper syncing/linking with the system.
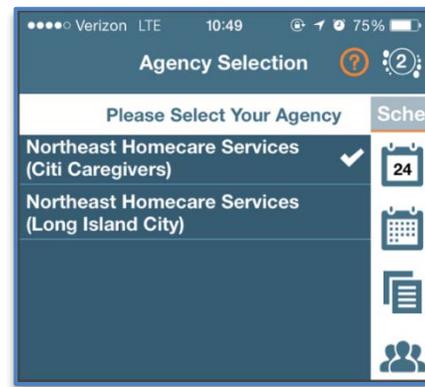
Switch Offices

Today's Schedule (2)

Today's Schedule is used to review and Clock In and Out of scheduled Visits for the present day.

Today's Schedule

Unscheduled Visits (3)

Unscheduled Visits allows Caregivers to submit EVV for unscheduled Visits. Caregivers create an unscheduled Visit for any Patient for which they have access to by selecting the Patient Profile.

Select **Patient not in the list** to create a new Visit if asked to provide service for a Patient a Caregiver has never worked with before.

EVV for an Unscheduled Visit generated via the **Patient not in the list** selection is automatically sent to **Call Maintenance** with the status "Unscheduled – Patient not Selected"; EVV cannot be linked because EVV is meant to provide proof to the Agency/Office that Caregivers were with the Patient.
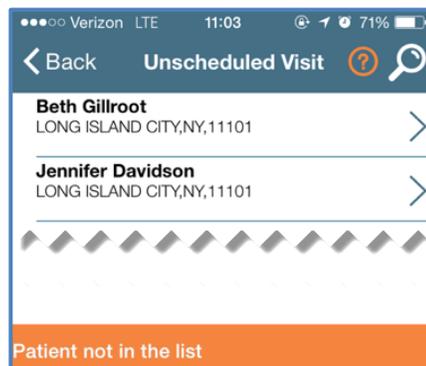
Create Unscheduled Visits

Note: Placing EVV and logging POCs for Unscheduled Visits follows the same process as Scheduled Visits.

Visits (4)

Select **Visits** to review all scheduled Visits up to two weeks in advance.

Completed and Scheduled Visits

Patients (5)

Select **Patients** to view a list of all the Patients the Caregiver has access to. Select a Patient to view Patient Info and Visits.

If authorized, Caregivers may also access the Patient's **Clinical** info and **Medications**.

Patient Details: Medicaitons

Patient Details: Info

Multiple Addresses appear in the Patient Infor tab if/as entered in the Patient Profile page (as illustrated in the image).

Patient Multi-Address

Messages (6)

Select **Messages** to review and respond to any messages sent from the Agency/Office. Follow the steps below to create, send, and filter messages on the Mobile App.

Step	Action
1	Click the notepad icon (as seen on the image) to enter a new message or respond to an existing one. **Agency Messages**
2	The Message window opens. Click the **plus** icon to select a recipient (To) and Priority. Compose the message in the text area. Click the **Send** button to send the message.
3	To sort existing messages, click the **filter** icon highlighted in the *Sort Messages* image.
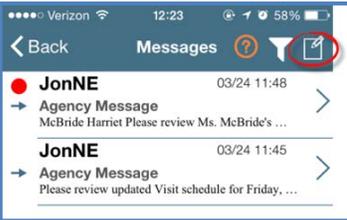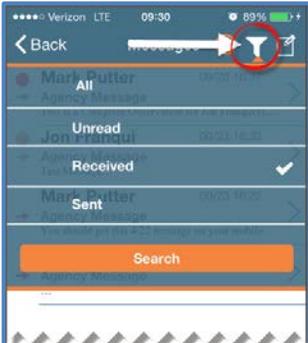
Clocking In and Out

This section provides the steps involved when Clocking In and Out of a Visit, as well as entering POC Duties and Patient Signatures.

Step	Action	
1	Select **Today's Schedule** from the Main Screen. Select the appropriate Visit. For example, **Beth Gillroot**.	
2	Upon selecting the Patient, the Clock-In/Out tab of the Visit Details page opens. Click on the *Clock In* button.	**Clock In/Out Tab**
3	Select either **GPS** or **Security Token** to submit an EVV. *Note: The term Security Token refers to the FOB Device.*	
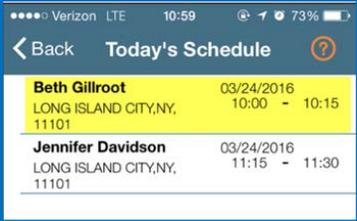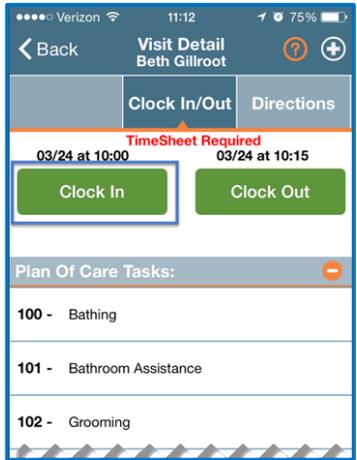
Step	Action
4	A successful EVV displays in green under the ***Clock In*** button (now grey), as illustrated in the image. ***Note:*** *Unsuccessful EVV placement times display in red instead of green.* **Successful EVV**
5	From the **Visit Detail** page, Caregivers can also access the following:

Options (Tab)	Description
***Directions* tab**	Syncs to the mobile device's GPS to provide directions to the Visit location.
***Patient Info* tab**	Displays the Patient's name, any phone numbers connected to the profile, their address, and emergency contacts.
***Care Plan* tab**	This page contains the Patient's POC listing each duty in detail, describing how often it is required along with additional instructions.
***Notes* tab**	This page maintains a record of notes the Caregiver or Agency makes for the Visit.

| Step	Action
6	When the Visit is completed, click the green Clock Out button on the *Clock In/Out* page. If the Visit included a Plan of Care (POC), the Caregiver is prompted to select the duties performed. Select the green circle (checkmark) for duties performed or the red circle (x) for duties refused. In addition, select the **Refused Duty Reason** if the Agency uses (requires) the functionality when a duty is marked refused. ***Note:*** *When servicing Mutual Patients, the Caregiver must enter separate POC duties for each Patient.* **Enter POC Duties**

Step	Action
7	If the Contract authorizing the Visit requires a Patient Signature, the Caregiver must obtain the signature on the device to process the Visit. **Skip Signature Disabled** **Patient Signature Required Alert** *Note: The **Patient Signature** may be required at Clock In and/or Clock Out depending on the Contract authorizing the Visit. This feature is configured by the Agency.*
8	If the Agency allows the Caregiver to skip the Patient Signature, then the Caregiver is prompted to click the *Skip* button and select the reason why the Patient cannot sign (required). The *Save* button is unavailable until a reason is selected. **Skip Signature Enabled Alert** **Select/Save Skip Reason**
9	Click *Save* once the required screens are completed. Doing so routes the user back to the **Visit Details** page with a confirmation message (as shown in the image). Click *OK* to return to the home screen. **Clock Out Confirmation**

For standard Clock IN and OUT of Linked and Mutual Patient Visits, refer to the Mobile App Clock IN/OUT of Linked and Mutual Visits Job Aid.

Additional Features

Settings and User Agreement

On the Main screen, select the Settings icon (3-dots) to access additional features such as: password change, see which Agencies/Offices are linked to the Mobile Device ID, unlink from an Agency/Office, and review User Agreement terms.
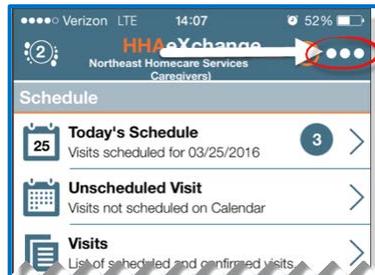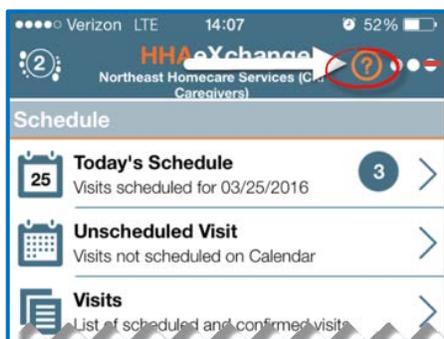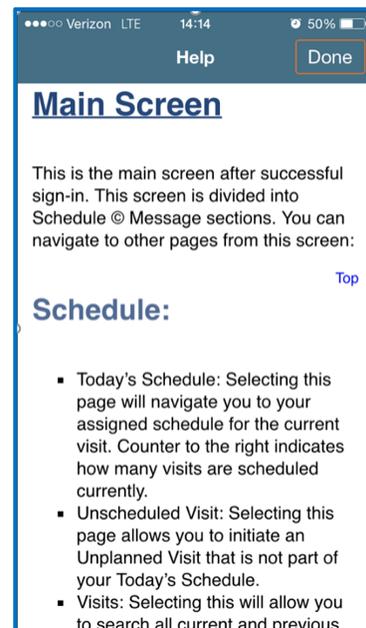

Settings Icon on the Main Screen

Settings Menu

User Guide

Click the **Help** icon (orange question mark) to access the Mobile App user guide at any time.

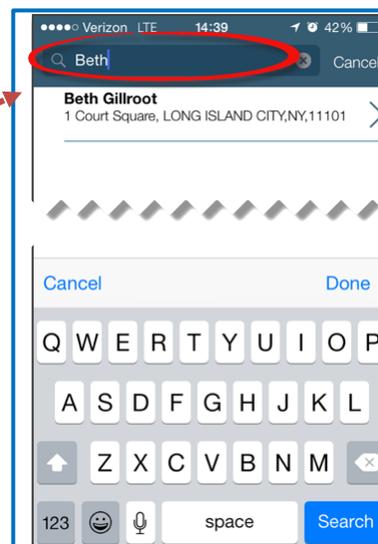**Settings Icon on the Main Screen**

Help Guide

Patient Search

Caregivers can search for Patients they have access to or have previously provided service for.

On the **Patients** page, click the Search icon (magnifying glass) to open the search bar prompting the entry of either a Patient's Name or their Address.

Search Icon on the Patient Page


Patient Search

Language Options

The Mobile App offers language options designed to accommodate Caregivers with their preferred language when using their mobile device. The following table provides instructions on how to change language settings.

Step	Action
1	Click on the **Options** icon on the top-right, as illustrated in the image. From the list of options, select **Change Language**. Options Change Language Option

Step	Action
2	A list of flag icons appears indicating the various language options available: • English (North America) • Russian • Spanish (Latin America) • Haitian Creole • French (European) • Korean • Chinese (Traditional) Select the preferred language option and click the **Apply** button. *Note: Other languages may be added in future releases. Scroll to locate other language (for example, English) on the device.* **Select Language**
3	Upon selecting the preferred language option, all menu items appear in the chosen language. In this case, Spanish was the selected language. *Note: To see Map functionality displayed in the selected language, users must first change the language, then <u>restart</u> the application to view those changes.* **Language Applied**

Patient Phone Number Descriptions

Patient phone number labels appear on the Mobile app corresponding to the descriptions entered in the **Phone 2** and **Phone 3** fields in the Patient Profile in the HHAX system, as seen in the following image.
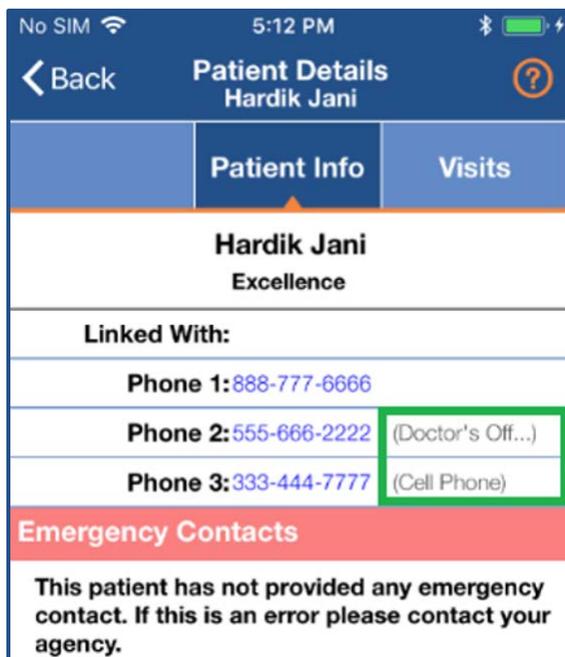
Phone Number Description Labels