



## Welcome to the PCAssistant Demonstration

1

### **Enhanced Efficiency**

Streamlined processes for improved operational efficiency and time management.

2

### **Enhanced Communication**

Effective communication channels leading to better coordination and client satisfaction.

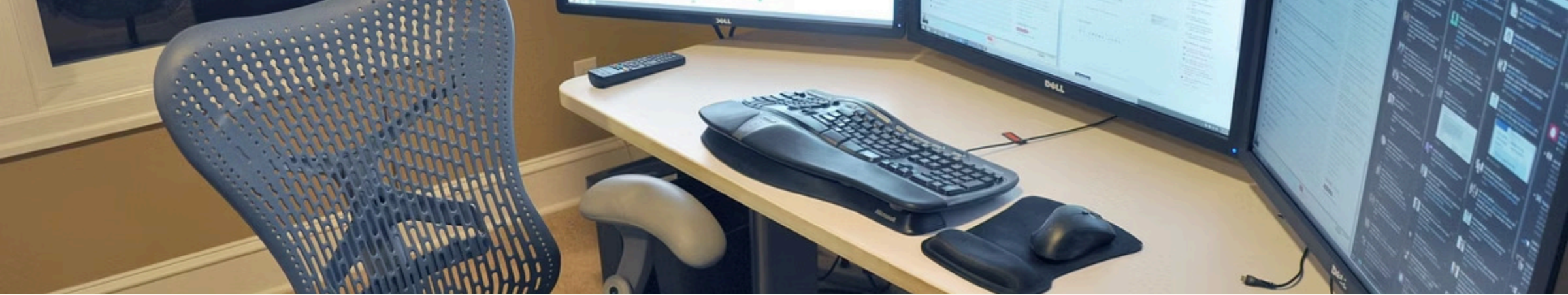
3

### **Enhanced Compliance**

Improved compliance measures ensuring the highest standard of care for clients.

# PCAssistant

**Our mission is to assist homecare agencies that utilize HHAExchange as business management and operating software to drastically cut operating costs, while optimizing business management and operation. The services we offer are fully customized to your needs. In essence, we automate the procedure you currently implement. Our program is designed to significantly lighten your office employee workload, while improving the work quality and efficiency, allowing you to cut your operating costs and improve billing, while concentrating on growing your business.**



# Services offered

## **1 EVV compliance assurance:**

- SMS Communication

## **2 EVV Call Management:**

- Call maintenance clearing
- Pre-Billing clearing

## **3 Timesheet confirmation**

## **4 HR compliance assurance**

# 1. EVV Compliance Assurance

- SMS Communication

In the environment of mandatory EVV compliance, efficient management of EVV clock in and clock out is paramount. Our program is designed to make the EVV compliance flawless and efficient. Our goal is to improve the EVV compliance by your caregivers and to manage all received calls to facilitate an easier billing process.

- **The system automatically sends an SMS reminder to caregivers within 5 minutes before the visit is scheduled to begin and to end, prompting better EVV compliance.**
- **The second step in our process of improving the discipline of your caregivers when it comes to EVV compliance is Missed EVV detection. Our SMS system detects the missing Clock In or Clock Out, and prompts your employee to clock in/clock out in real time. The prompts continue to go out periodically until the EVV is received (customizable by Client).**



## 2. EVV Call Management

PCAssistant automatically handles most call maintenance and pre-billing issues, such as potential in/out error, calls from an unrecognized caller ID, duplicate calls, and it can adjust schedule times and visit times in accordance with the procedure approved by the client. The system is fully customizable to meet the client's operational requirements.

- **Call maintenance clearing**

**All calls that are not linked by EVV and enter Call Dashboard are handled in accordance with the procedure approved by the client. Our program is capable of matching such calls to the schedule and adjust visit schedule to avoid prebilling issues. The calls are linked or rejected as appropriate.**

- **Pre-Billing clearing**

**Finally, the calls that are linked by EVV but create Pre-Billing problems are handled in accordance with the procedure approved by the client. Our program is capable of matching such calls to the schedule and adjust visit schedule to repair prebilling issues such as unbalanced or overlapping visits. Our program confirms the POC duties with your employees and assures POC compliance. The program is cable of handling 24-hour and 12/12 hour split shift visits.**

# SMS Notification and Warning

## Visit Reminder:

SMS is sent within 5 minutes before the visit is scheduled to begin and end. This ensures better EVV compliance, reduces the number of required timesheets and increases billable visits.

Visits

Search Visits

Admission ID

Patient Last Name

From Date

To Date

01/06/2026

01/06/2026

+ Advanced Filters

Search

Total Visits

Total Visits (428) | Total Call In (30) | Total Call Out (0)

Coordinators	Admission ID	Patient	Caregiver	Assignment ID	Office	Visit Date	Schedule Time	Visit Time	Call In	Call Out	Billed	Paid	Contract	Disciplines	Actions
						01/06/2026	2300-0700		N	N	N	N		PCA	
						01/06/2026	2300-0700		N	N	N	N		PCA	
						01/06/2026	1930-2330		N	N	N	N		PCA	
						01/06/2026	1900-2300		N	N	N	N		PCA	
						01/06/2026	1900-2300		N	N	N	N		PCA	
						01/06/2026	1900-0700		N	N	N	N		PCA	
						01/06/2026	1900-0700		N	N	N	N		PCA	
						01/06/2026	1830-2130		N	N	N	N		PCA	

## Sample messages to caregiver (fully customizable) :

"Your agency name". Your visit is scheduled to begin. Please clock in.

"Your agency name". Your visit is scheduled to end. Please clock out.

# EVV Call Management

## SMS Reminder

**Step 1:** PCAssistant detects missing EVV clock IN/Outs and addresses them as they post on HHAExchange.

**Step 2:** The caregiver that failed to clock IN/Out is detected and PCAssistant proceeds to locate the caregiver in HHAExchange database via the Search Caregiver Screen and verifies the missing visit confirmation time.

**Step 3:** A custom message is then sent to the caregiver reminding the caregiver to clock IN/Out.

**Step 4:** The process is repeated at set intervals in real time until the clock IN/Out is received.

Call Dashboard

Call Maintenance (3932)

Missed In (0)

Missed Out (15)

Missed Call (41)

Visit Log

Call Log

Rejected Calls

Corrections (0)

Search Missed Out Calls

Office(s)  
All selected

Coordinator  
All

From Date & Time  
01/01/2026

To Date & Time  
01/06/2026

+ Advanced Filters

Search

Send Message

View Report

Search Results (15)

Patient Name	Assignment ID	Admission ID	Caregiver Name	Visit Date	Coordinators	Schedule	Contract	Discipline	Service Code	Caregiver Team	Actions
				01/05/2026		1630-2130		PCA			
				01/05/2026		1500-2000		PCA			
				01/05/2026		1330-1730		PCA			
				01/05/2026		1200-1700		PCA			
				01/05/2026		1200-1600		PCA			
				01/05/2026		1000-1500		PCA			
				01/05/2026		0930-1445		PCA			

# EVV Call Management

## Faulty calls Management

PCAssistant addresses all faulty calls that post on call dashboard as they are received.

### Call Dashboard

[Call Maintenance \(5\)](#)[Missed In \(12\)](#)[Missed Out \(11\)](#)[Missed Call \(21\)](#)[Visit Log](#)[Call Log](#)[Rejected Calls](#)[Corrections \(0\)](#)

#### Search Calls

Office(s)  
All selected

Coordinator  
All

From Date & Time  
01/11/2026  
hhmm

To Date & Time  
01/11/2026  
hhmm

[+ Advanced Filters](#)

Search

Send MessageView Report

Call Maintenance Calls (5)

ReprocessCreate Automatic Schedules

Assign. ID#	Caregiver Code	Caregiver Name	Office Name	Caregiver Phone	Caregiver Team	Patient Name	Call Date	Call Time	Call Type	Caller ID	Status	Action
				Phone1 : Phone2 :			01/11/2026	10:31	IN History		No Schedule Opening	Reject
				Phone1 : Phone2 :			01/11/2026	10:08	IN History		Out of Window	Reject
				Phone1 : Phone2 :			01/11/2026	08:59	IN History		Different Scheduled	Reject
				Phone1 : Phone2 :			01/11/2026	08:00	IN History		Different Scheduled	Reject
				Phone1 : Phone2 :			01/11/2026	07:43	OUT (0) History		Out of Window	Reject

# EVV Call Management

## Faulty calls Management

The first step is to detect whether it is possible to link the call.

The screenshot displays the 'Call Dashboard' interface. At the top, there's a navigation bar with tabs: 'Call Maintenance' (selected), 'Missed In (12)', 'Missed Out (11)', 'Missed Call (21)', 'Visit Log', 'Call Log', 'Rejected Calls', and 'Corrections (0)'. Below the navigation bar, the 'Call Maintenance' section is visible, featuring a 'Search Calls' panel on the left and a 'Call Maintenance Calls (5)' table below it. The 'Search Calls' panel includes a dropdown for 'Office(s)' set to 'All selected' and a 'Search' button. The 'Call Maintenance Calls (5)' table has columns: 'Assign. ID#', 'Caregiver Code', 'Caregiver Name', and 'Office Name'. A modal window titled 'Caregiver Schedule' is open in the center. It has a close button (X) in the top right corner. Below the title, there's a note: 'Note: Displays only active Patients'. The modal contains a table with columns: 'Patient Name', 'Coordinators', 'Phone', 'Scheduled Date', 'Schedule Time', 'Schedule Duration', 'Visit', 'Link', and 'Actions'. The table has one row with data: 'Patient Name' (redacted), 'Coordinators' (redacted), 'Phone' (redacted), 'Scheduled Date' (01/11/2026), 'Schedule Time' (1100-1500), 'Schedule Duration' (redacted), 'Visit' (redacted), 'Link' (a green 'Link' button), and 'Actions' (a blue icon). At the bottom right of the modal is a 'Close' button. In the background, the 'Call Maintenance' section is partially visible, showing a 'To Date & Time' field set to '01/11/2026' and a 'Status' table with columns 'Status' and 'Action'. The 'Status' table has five rows with status values: 'No Schedule Opening', 'Out of Window', 'Different Scheduled', 'Different Scheduled', and 'Out of Window', each with a 'Reject' action button.

**Call Dashboard**

**Call Maintenance** Missed In (12) Missed Out (11) Missed Call (21) Visit Log Call Log Rejected Calls Corrections (0)

**Search Calls**

Office(s)  
All selected

+ Advanced Filters

Search

**Call Maintenance Calls (5)**

Assign. ID#	Caregiver Code	Caregiver Name	Office Name
[redacted]	[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]	[redacted]

**Caregiver Schedule**

Note: Displays only active Patients

Patient Name	Coordinators	Phone	Scheduled Date	Schedule Time	Schedule Duration	Visit	Link	Actions
[redacted]	[redacted]	[redacted]	01/11/2026	1100-1500	[redacted]	[redacted]	Link	[redacted]

Close

**To Date & Time \***  
01/11/2026

Send Message View Report

Reprocess Create Automatic Schedules

Status	Action
No Schedule Opening	Reject
Out of Window	Reject
Different Scheduled	Reject
Different Scheduled	Reject
Out of Window	Reject



# EVV Call Management

## Faulty calls Management

If there is a possibility to link the call, we then enter the Visit Information and Edit Link Call pages to link the call to the visit/calendar.

HHA Exchange - Edit Visit Link Call

app.hhaexchange.com/

Find Calls

Find calls view here

Call Date	Call Time	Caregiver Name	Patient Name	Reason	New Reason	Action Taken	Notes
01/11/2026	10:08			Out of Window	--Select--	--Select--	<div></div> <div>Limit to 1000 characters</div> <div>Link</div>

Close

# EVV Call Management

## Faulty calls Management

The linked visit then appears in the calendar creating a billable visit.

Non Skilled Schedule

Visit Information

[History](#)[Print](#)

All fields marked with an asterisk (\*) are required.

Scheduled Time ⓘ  
1100-1500

Add Pre-Shift

Add Post-Shift

TT/OT (hh:mm) ⓘ  

00

00

☐ Missed Visit

Visit Start Time  

1058

01/04/2026

Visit End Time  

1504

01/04/2026

EVV Call In  
📞 01/04/2026 10:58

EVV Call Out  
📞 01/04/2026 15:04

Prebilling Problem(s)  
Caregiver Compliance

New Reason \*  
Select

Action Taken  
Select


New Note

Limit to 1000 characters

Source	Reason	Action Taken	Note	User	Date/Time	Action
📅	Data Entry Error	Confirmed visit with the client or the client's family member/representative and documented	Confirmed with client or the client's family member/Representative		1/4/2026 3:21:09 PM	🖨️

Save

Close



**PCAssistant automatically handles most other call dashboard issues, such as potential in/out error, calls from an unrecognized caller ID, duplicate calls, and it can adjust schedule times and visit times in accordance with the procedure approved by the client.**

# Pre-billing Clearing

## Missing POC Compliance

PCAssistant detects visits missing POC compliance in pre-billing.

Prebilling Review

Prebilling Review Search

Contract

All selected

Office(s)

All selected

From Date

10/13/2025

To Date

01/11/2026

Advanced Filters

Coordinator

All selected

Patient Team

All selected

Patient Location

All selected

Patient Branch

All selected

Discipline

All selected

Caregiver Team

All selected

Caregiver Location

All selected

Caregiver Branch

All selected

Patient Name

Caregiver Name

Timesheet

All selected

Service Code

Search by last name or ID. Enter at least 2 characters to search

Search by last name or ID. Enter at least 2 characters to search

☐ Check All Validation

☐ Unbalanced Visits

☐ Overlapping Shifts

☐ Authorization

☐ Incomplete Confirmation

☐ OT/TT Not Approved

☐ Clinical Documentation

☐ With Temp Caregiver

☐ Restricted Caregivers

☐ Medicaid Compliance

☐ Caregiver Compliance

☐ Timesheet

☐ Missing Service Portal Approval

☒ POC Compliance

☐ Insufficient Duty Minutes

☐ Custom Validations

Search

View Report

Prebilling Review

Total Search Result: 1 | Total Hourly: [04:00] | Total Visit: [00:00] | Total Daily: [00:00]

Visit Date	Admission ID	Patient	Office	Contract	Caregiver	Service Code	Coordinator	Scheduled Time	Visit Time	Disciplines	IE	Problems	Actions
01/11/2026						PCA-hourly		0630-1030	0630-1030	PCA		POC Compliance	

13

# Pre-billing Clearing

## Missing POC Compliance

PCAssistant proceeds to locate the caregiver in HHAExchange database via the Search Caregiver Screen.

Caregivers

Search Caregivers

Last Name

First Name

Offices

Status

All selected

Active

+ Advanced Filters

Search

Search Results (1)

Caregiver	SSN	Alt_Caregiver_Code	Office(s)	Date of Birth	Phone	Team	Type	Discipline	Status	Action
				04/01/1995			Employee	PCA	Active	

Page 1 of 1



## Pre-billing Clearing Missing POC Compliance

A custom message is sent to the caregiver confirming the POC duties to be entered for that visit.



**To submit the timesheet, please confirm that you have completed the following skills/duties by signing below**

Duties:

PERSONAL CARE: Tub, Shower, Bed. Dressing: Total, Assist. Skin Care: Lotion, Other. Medications: Assist, Remind. Light Housekeeping. Diversional Activities: Speak, Read. Monitor Patient Safety.



**Please confirm that the visit was completed as scheduled by signing below.**

Visit Dates :

01/04

**Caregiver Signature**

**Submit**

## Pre-billing Clearing Missing POC Compliance

POC duties, as confirmed, are entered into HHAExchange database creating a billable visit.

No Records

<input type="checkbox"/> Duties Performed	<input type="checkbox"/> Duties Refused	Duty Number	Category	Duty	Additional Value	Minutes
<input type="checkbox"/>	<input type="checkbox"/>	101	Personal Care	Bath-Shower		
<input type="checkbox"/>	<input type="checkbox"/>	106	Personal Care	Mouth Care/Denture Care		
<input type="checkbox"/>	<input type="checkbox"/>	107	Personal Care	Hair Care-Comb		
<input type="checkbox"/>	<input type="checkbox"/>	108	Personal Care	Hair Care-Shampoo		
<input type="checkbox"/>	<input type="checkbox"/>	110	Personal Care	Grooming-Nails		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	111	Personal Care	Dressing		0
<input checked="" type="checkbox"/>	<input type="checkbox"/>	112	Personal Care	Skin Care		0
<input checked="" type="checkbox"/>	<input type="checkbox"/>	113	Personal Care	Foot Care		0
<input type="checkbox"/>	<input type="checkbox"/>	114	Personal Care	Toileting-Diaper		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	117	Personal Care	Toileting-Toilet		0
<input type="checkbox"/>	<input type="checkbox"/>	126	Personal Care	Transfer		
<input type="checkbox"/>	<input type="checkbox"/>	130	Personal Care	Bladder Incontinence		
<input type="checkbox"/>	<input type="checkbox"/>	147	Treatment / Special Needs	Medications - Assist		
<input type="checkbox"/>	<input type="checkbox"/>	148	Treatment / Special Needs	Medications - Remind		
<input type="checkbox"/>	<input type="checkbox"/>	149	Treatment / Special Needs	Observe Physical and / or Mental Changes		
<input type="checkbox"/>	<input type="checkbox"/>	201	Nutrition	Patient is on a prescribed diet		
<input type="checkbox"/>	<input type="checkbox"/>	202	Nutrition	Prepare-Breakfast		

Save
Close

# Pre-billing Clearing

We can also clear other pre-billing problems, such as unbalanced visits created by EVV, or 24 hour and split shift case errors.

Prebilling Review

Prebilling Review Search

Contract

All selected

Office(s)

All selected

From Date

10/15/2025

To Date

01/13/2026

Advanced Filters

Coordinator

All selected

Patient Team

All selected

Patient Location

All selected

Patient Branch

All selected

Discipline

All selected

Caregiver Team

All selected

Caregiver Location

All selected

Caregiver Branch

All selected

Patient Name

Caregiver Name

Timesheet

All selected

Service Code

Search by last name or ID. Enter at least 2 characters to search

Search by last name or ID. Enter at least 2 characters to search

☐ Check All Validation

☒ Unbalanced Visits

☒ Overlapping Shifts

☐ Authorization

☒ Incomplete Confirmation

☐ OT/TT Not Approved

☐ Clinical Documentation

☐ With Temp Caregiver

☐ Restricted Caregivers

☒ Medicaid Compliance

☐ Caregiver Compliance

☒ Timesheet

☐ Missing Service Portal Approval

☒ POC Compliance

☐ Insufficient Duty Minutes

☐ Custom Validations

Search

View Report

Prebilling Review

Total Search Result 1575 | Total Hourly (8359:30) | Total Visit (00:00) | Total Daily (00:00)

Visit Date	Admission ID	Patient	Office	Contract	Caregiver	Service Code	Coordinator	Scheduled Time	Visit Time	Disciplines	TF	Problems	Actions
10/15/2025								0900-1300	0900-1300	PCA	90	Timesheet Not Approved	
10/15/2025								1000-1500		PCA		Incomplete Confirmation, TEMP Caregiver, Not Authorized (Black Out Date)	
10/16/2025								1000-1500		PCA		Incomplete Confirmation, TEMP Caregiver, Not Authorized (Black Out Date)	
10/16/2025								0900-1300	0900-1300	PCA	91	Timesheet Not Approved	

### 3. Electronic Timesheet Confirmation

While the EVV compliance is mandatory, every agency is faced with the fact that 100% EVV compliance is not attainable. Obtaining, confirming and uploading timesheets for visits with missed EVV is a tedious, time and labor consuming process. Our program makes this process as seamless as possible.

**Step 1:** First step is detecting visits with missed EVV that require a timesheet. We detect visits with missed EVV and prompt the scheduled caregiver to provide a timesheet for such visit.

**Step 2:** The caregiver receives an SMS link containing a pre-filled digitized timesheet of the exact form currently used by the client. The caregiver confirms duties performed, both the caregiver and the client sign the signature pads, and hit the “submit” button.

**Step 3:** We confirm the received timesheet in HHAExchange, creating a billable visit, and upload a .pdf copy.

**Step 4:** We also send a .pdf copy of a signed timesheet to the client via email for record keeping.



## Electronic Timesheet Confirmation Demonstration

**Step 1:** In pre-billing, PCAssistant detects visits missing EVV confirmation.

**Step 2:** PCAssistant proceeds to locate the caregiver in HHAExchange database via the Search Caregiver Screen and verifies that timesheets are required.


**Step 3:** A custom message identifying the visit for which the timesheet is required is automatically created and sent to the non-compliant caregiver requesting a timesheet.

### Sample messages to caregiver (fully customisable) :

"Your agency name". Please click the link to complete and submit the required timesheet. **https://**xxxxxxxxxxxxxxxxxx




Electronic Timesheet Confirmation Demonstration



**To submit the timesheet, please confirm that you have completed the following skills/duties by signing below**

Duties:

PERSONAL CARE: Tub,Shower, Bed. Dressing: Total,Assist. Skin Care: Lotion,Other. Medications: Assist,Remind. Light Housekeeping. Diversional Activities: Speak,Read. Monitor Patient Safety.



**Please confirm that the visit was completed as scheduled by signing below.**

Visit Dates :

01/04

Patient Signature

Caregiver Signature

Submit

←

→

↺


time-sheet.net

🎤

📶

📱

⋮



Undo last stroke

Submit



## 4. HR Compliance Assurance

Compliance is paramount. Our program is designed to ensure that your Agency will never miss an upcoming compliance item expiration. We detect a deadline on medical or I-9 compliance for your caregivers. We then send an SMS prompting that caregiver to provide the updated information. Simultaneously, an SMS is sent to your designated office employee informing such employee of the nearing deadline. We can customize this process for deadlines, for any compliance item your Agency enters into HHAExchange, such as In-service education or nurse visits. Compliance Assurance process eliminates human error and tardiness in pulling and checking compliance reports.



# Conclusion

1

## **Enhanced Efficiency**

Streamlined processes for improved operational efficiency and time management.

2

## **Enhanced Communication**

Effective communication channels leading to better coordination and client satisfaction.

3

## **Enhanced Compliance**

Improved compliance measures ensuring the highest standard of care for clients.

**Thank you for viewing our presentation. If you would like to know more about our company and the product, please do not hesitate to contact us at**

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**for more information and pricing.**