



# Services Portal for Self-Direction

User's Guide

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# The Services Portal for Self-Direction

## Introduction

This guide explains how to use the Services Portal for viewing, approving, adjusting, and denying shifts created with Electronic Visit Verification (EVV). This guide is for users of the Services Portal including Consumers, Caregivers, Representatives, and Employers.

## Key Terms and Definitions

Depending on where you live and what program you participate in, you may use different words to describe yourself. This guide will use the following terms to describe the people that use and manage the Services Portal.

Term	Definition
<b>Consumer</b>	Refers to the Member, Client, Participant, or Recipient. This is the person receiving services. Typically, The Consumer is also the Employer of the Caregiver.
<b>Caregiver</b>	Refers to the PCA, DSP, PHW, Employee, or Worker. The Caregiver is the person providing services to Consumers.
<b>Representative</b>	Refers to a friend or family member of the Consumer. They can also be called: Surrogate, Family, Designees, or Circle of Support. A representative might help with approving timesheets, finding a Caregiver to hire, and scheduling Caregivers.
<b>Employer</b>	Refers to the person that is considered the legal employer of the Caregivers. Typically, this person is also the Consumer, but can sometimes be a different third party or an Agency.
<b>FMS Provider</b>	Refers to the Agency or organization coordinating services for the Consumer. This is an organization that collects the timesheets, processes hiring paperwork, and manages payroll for Consumers.
<b>HHAX</b>	Acronym for HHAExchange

### What is EVV?

EVV stands for Electronic Visit Verification. Caregivers use an app to electronically record the start and end times of each shift they work (also called a visit). Caregivers will be required to send information about visits to an EVV system at the beginning and end of each visit. EVV helps verify that Consumers are getting the care they need. Congress passed the 21st Century Cures Act, requiring state Medicaid programs to use EVV for certain home and community-based services.

### What is the Services Portal?

The Services Portal is a website that helps self-directing Consumers meet EVV requirements while keeping choice and control in their self-direction. The Services Portal is used for approving, adjusting, denying, and viewing shifts. Shifts are automatically sent to the Services Portal when a Caregiver records a shift using the Mobile App. Caregivers can use the Services Portal to record Holiday, PTO, or Sick Time if available to them. Shifts can also be created manually in the Services Portal if needed.

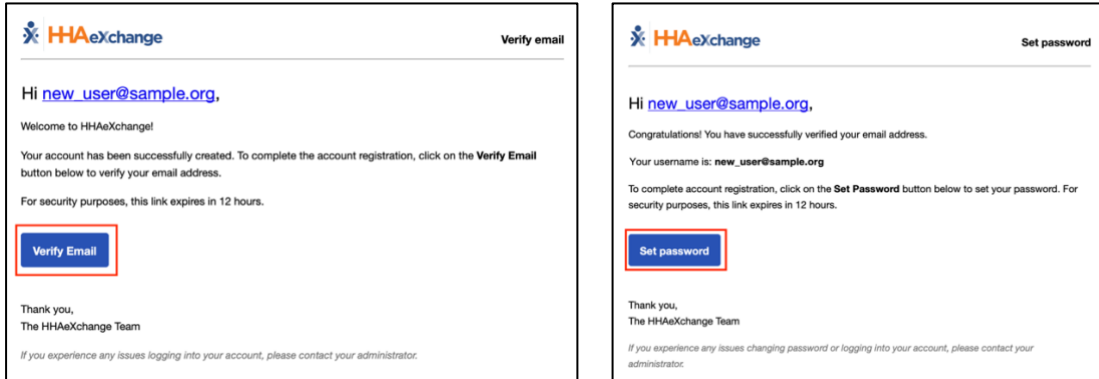
### Signing Up for Your Account

All Consumers, Caregivers, and Representatives that will use EVV need to sign up for an account through the Services Portal. This account will give you access to the features of the Services Portal and will also give Caregivers access to the Mobile App for recording time worked. More information on the Mobile App can be found in the [User Guide for the Caregiver Mobile App](#).



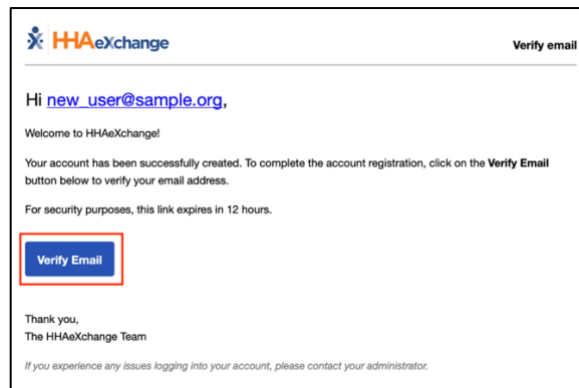
A valid email address is required to create your account. Be sure that your FMS Provider has your up-to-date and preferred email on file. An administrator at your FMS Provider will start the process of setting your account up. You will then receive two emails with instructions on the remaining steps to confirm your account and set a password.

When the FMS Provider has created your account, you receive two emails – first, one with a link to confirm your email address, then a second email to set your password. Below are sample images of these emails. You can complete this process on a smartphone, tablet, or computer.



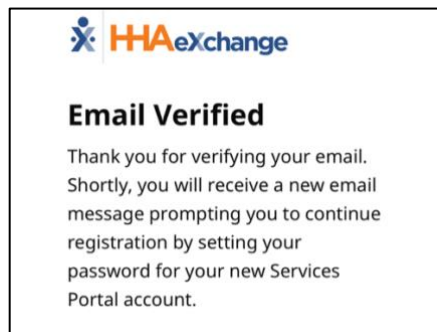
**Sample Verify and Set Password Emails**

1. Start by clicking or tapping on the Verify Email button in the first email.



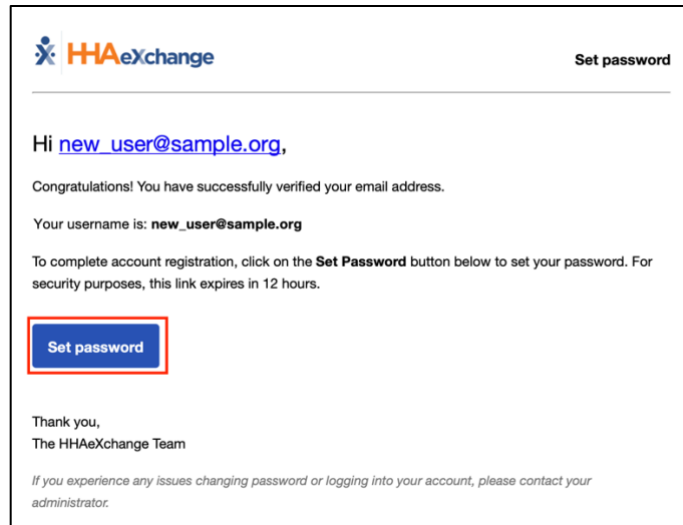
**Verify Email Button**

2. This will open a screen that shows your email is Verified. Shortly after that, the Set Password email will be sent to your inbox.



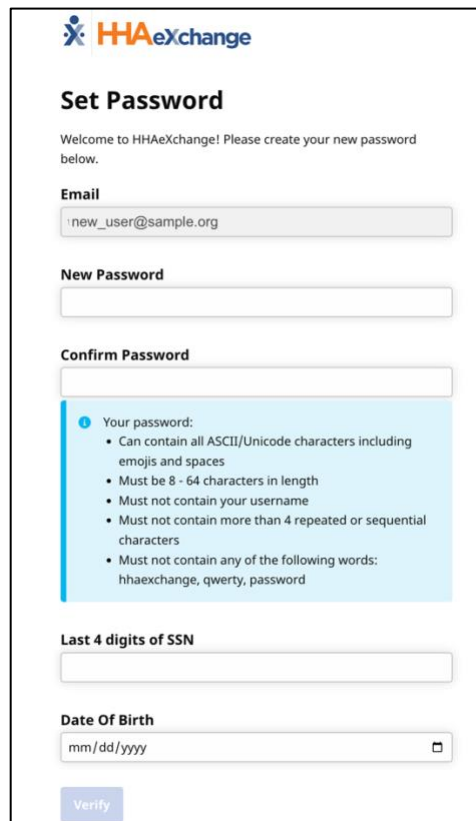
**Email Confirmation Screen**

3. Click or Tap on the blue **Set Password** Button in the second email.



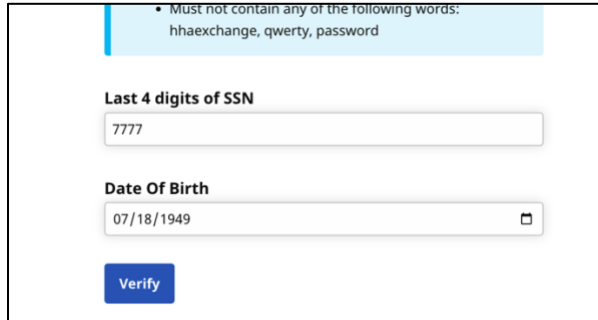
**Set Password Button**

4. This will open the Set Password Form. Your email address will be prefilled in. You must enter a **New Password**, following the on-screen requirements, then enter the password again in the **Confirm Password** box.



**Set Password Form**

5. Enter the last four digits of your Social Security Number (SSN) and your **Date of Birth** to verify your identity. Then click on the Verify Button.



• Must not contain any of the following words:  
hhaexchange, qwerty, password

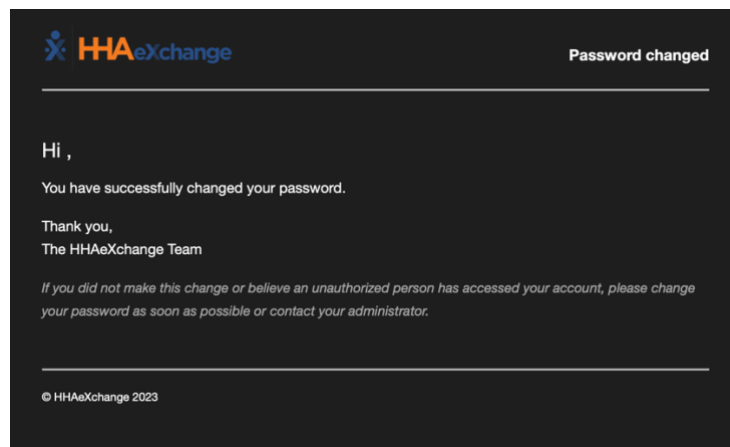
**Last 4 digits of SSN**

**Date Of Birth**

**Verify**

**SSN and Date of Birth Verification**

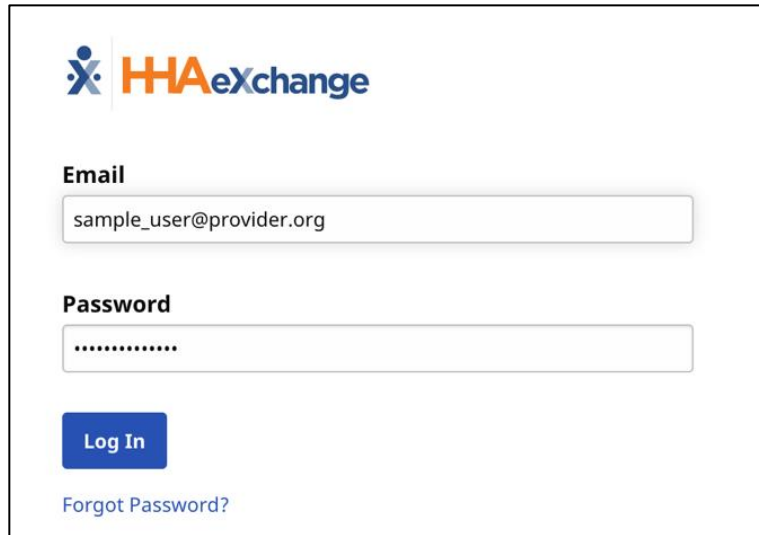
6. You will be returned to the Log In screen, where you can login to the Services Portal for the first time. Caregivers will also be able to login to the Mobile App now. Shortly after completing the sign-up process, you will receive a Password Changed email, letting you know that you successfully updated your password.



**Password Changed Email**

### Log In

1. Open the Services Portal website in a browser on your smartphone, tablet, or computer.
2. Enter your email address and password, then click the **Log In** button.



The screenshot shows the login interface for the HHAexchange Services Portal. At the top left is the HHAexchange logo. Below it, there are two input fields: one for 'Email' containing the text 'sample\_user@provider.org' and one for 'Password' containing a series of dots. A blue 'Log In' button is positioned below the password field. At the bottom left of the form area, there is a link that says 'Forgot Password?'.

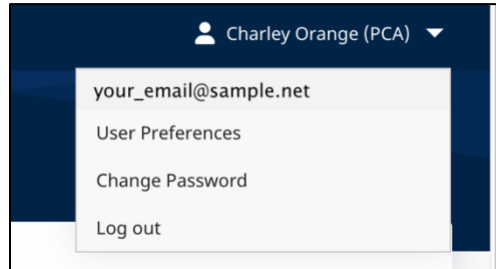
Services Portal Login Screen

3. If you have forgotten your password, you can click the **Forgot Password** link below the button. See [Resetting Your Password](#) for more information.



## Navigating The Services Portal

In the upper right corner of the screen there is a person icon. Clicking on that icon will bring up a menu with a few options.

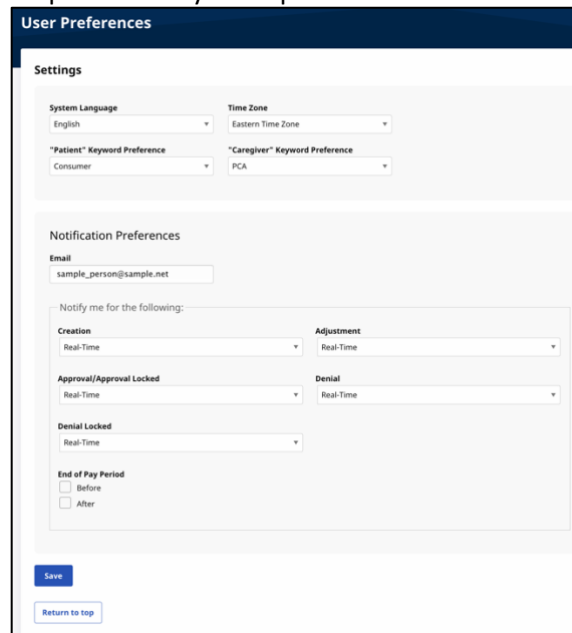


Services Portal Menu

Select...	To...
<b>User Preferences</b>	Personalize your experience in the Services Portal. Including Language, Time Zone, Keywords, and Notification preferences.
<b>Change Password</b>	Change your password to login to the Services Portal.
<b>Logout</b>	Log yourself out of the Services Portal.

## User Preferences

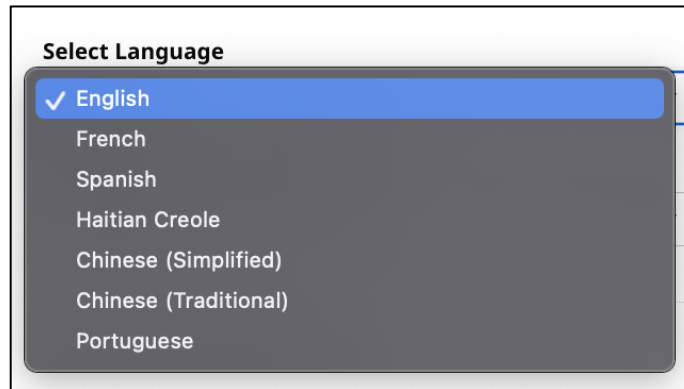
Users Preferences allow you to personalize your experience in the Services Portal.



User Preferences Screen

## Select Language

Set your preferred language for the Services Portal. Menu options, buttons, and language will change throughout the Services Portal.



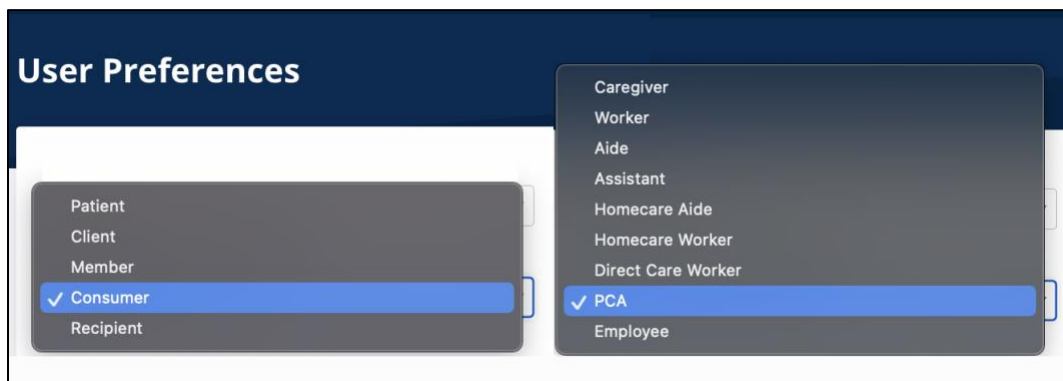
Language Options Dropdown Menu

## Time Zone

This will default to the Time Zone where you live/work.

## Keyword Preferences

These dropdowns allow you to choose the word that the Services Portal will use to refer to Consumers and Caregivers. The default words are Consumer and PCA.



Consumer and PCA Keyword Preference Dropdown Menus

## Notification Preferences

When events happen in the Services Portal, you can be notified by email about them. The FMS Provider/Fiscal Intermediary may choose to default the notifications for some actions to Real-Time when you first sign up. You can change these notification frequencies for your account at any time.

You can choose to be notified on the frequency you prefer and a different frequency for each type of event. Click on the **Frequency** drop down to set how often you are notified. Frequencies can be set to Weekly, Real-Time, Hourly, Daily, and Off.

**Notification Preferences**

**Email**

Notify me for the following:

<b>Creation</b> <input type="text" value="Real-Time"/>	<b>Adjustment</b> <input type="text" value="Real-Time"/>
<b>Approval/Approval Locked</b> <input type="text" value="Real-Time"/>	<b>Denial</b> <input type="text" value="Real-Time"/>
<b>Denial Locked</b> <input type="text" value="Real-Time"/>	

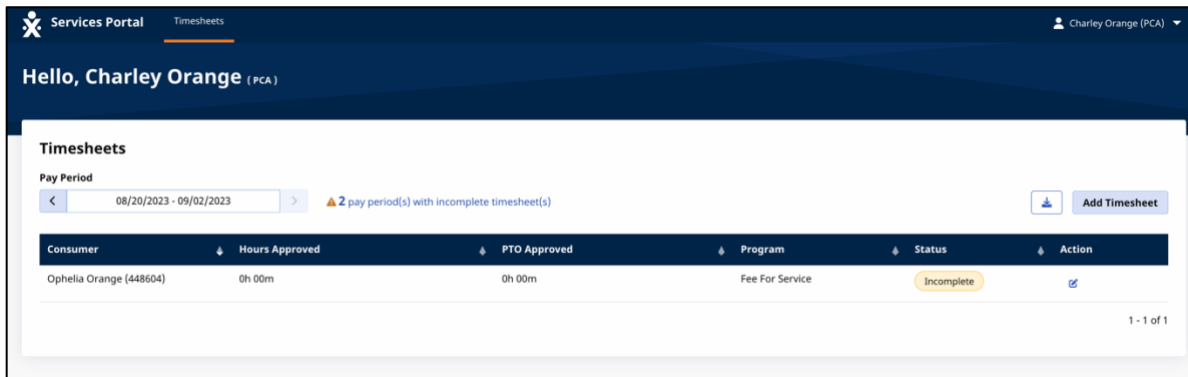
**End of Pay Period**  
 Before  
 After

**Notification Preferences**

If you choose a weekly notification, you can set the day of the week that the email will be sent to you. After updating any of these selections, click the **Save** button at the bottom of the page.

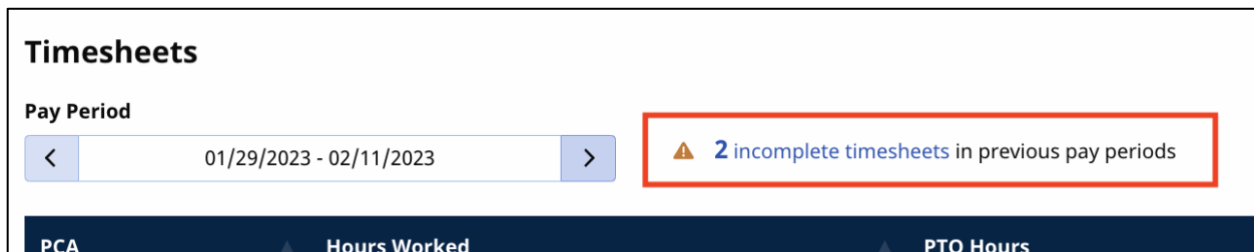
## Using the Services Portal to Manage Shifts

After logging in, you will be brought to the main page of the Services Portal. This is the Timesheets page. It will default to showing the timesheet for the current pay period. There is also basic information about the timesheet displayed. This includes the total hours worked on the timesheet, PTO hours (if any), name of the Consumer’s Program, timesheet status, and an edit button (under the Actions column).

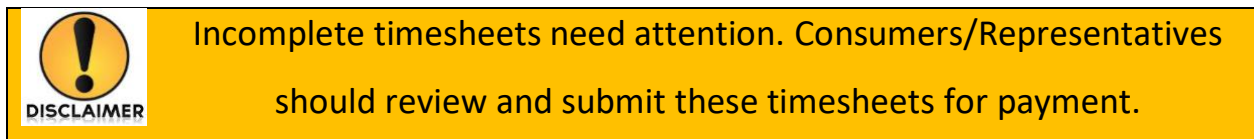


Timesheets Page

There is a notification in the center of the page letting you know if you have any incomplete timesheets. These are timesheets with shifts that have not been approved/or denied, or timesheets that haven’t been submitted for payment yet.

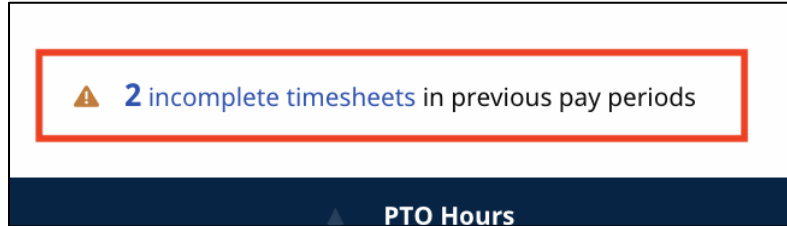


Incomplete Timesheet Notice



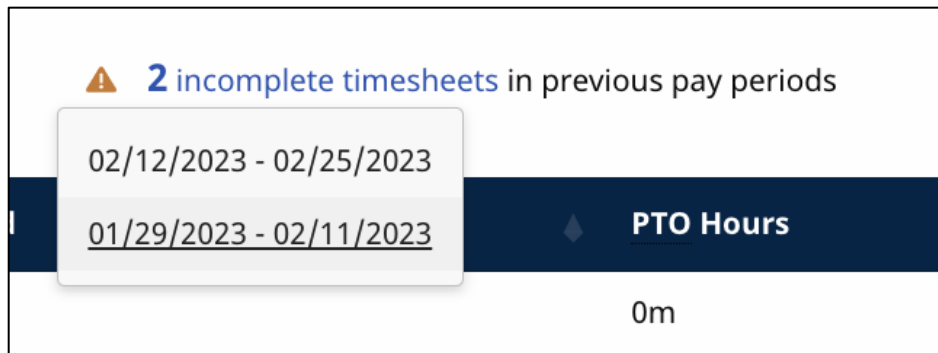
## View Shifts

1. Click on the **Incomplete Timesheets** Link.



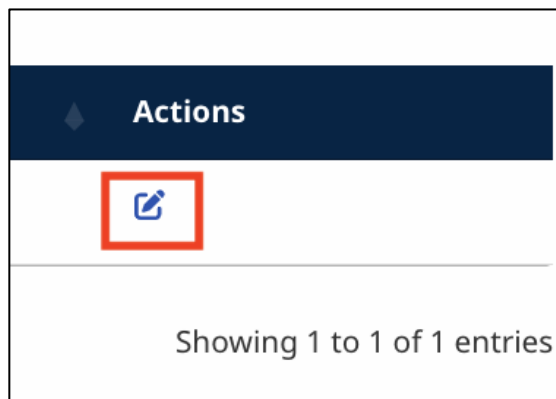
Incomplete Timesheet Link

2. Select the Date Range of the Pay Period to show the Timesheet info for that period.



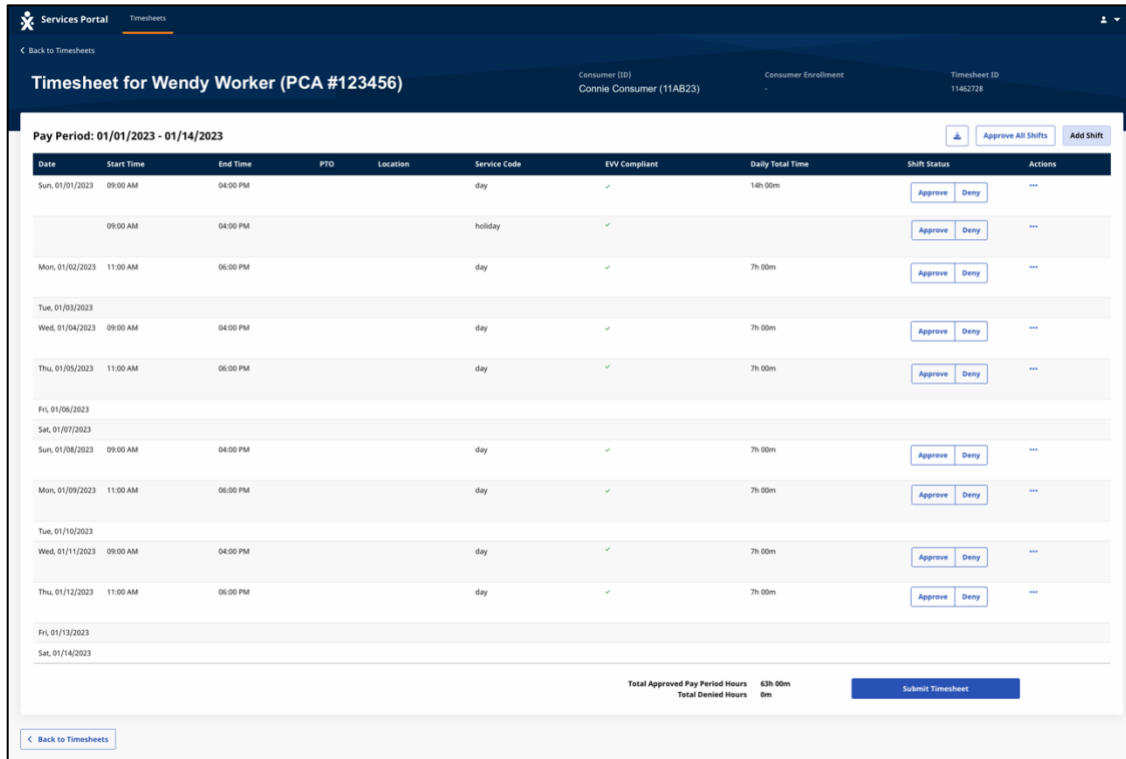
Select Pay Period

3. Click on the **Edit** Button, which looks like a pencil in a box, under the Action Column to show the Timesheet details.



Edit Button

4. This will display a summary of all shifts recorded for that pay period.



### Viewing a Timesheet

When viewing a timesheet, there are several pieces of information displayed about the shifts.

Heading	This is...
<b>Date</b>	The date of the shift.
<b>Start Time</b>	The time that the shift began.
<b>End Time</b>	The time that the shift ended.
<b>PTO</b>	If this shift was recorded as PTO, a PTO icon will be shown.
<b>Location</b>	When a shift is manually entered, the location of Home or Community is specified and will be shown here.
<b>Service Code</b>	A description of the service code.
<b>EVV Compliant</b>	A green check mark means that the shift is EVV compliant, a red stop sign means that the shift is not EVV compliant.
<b>Daily Total Time</b>	The total hours worked on that day. If the Caregiver worked more than one shift of the same day, this will be the total hours worked on that day.
<b>Shift Status</b>	The status of the shift. See the Shift Status table for more info.
<b>Actions</b>	If there are three dots in the actions column, you can click on the dots for a popup menu of actions you can take on that shift.

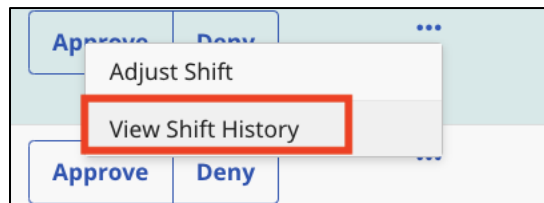
## View Shift History/Details

1. Click on the three dots under the Actions Header.



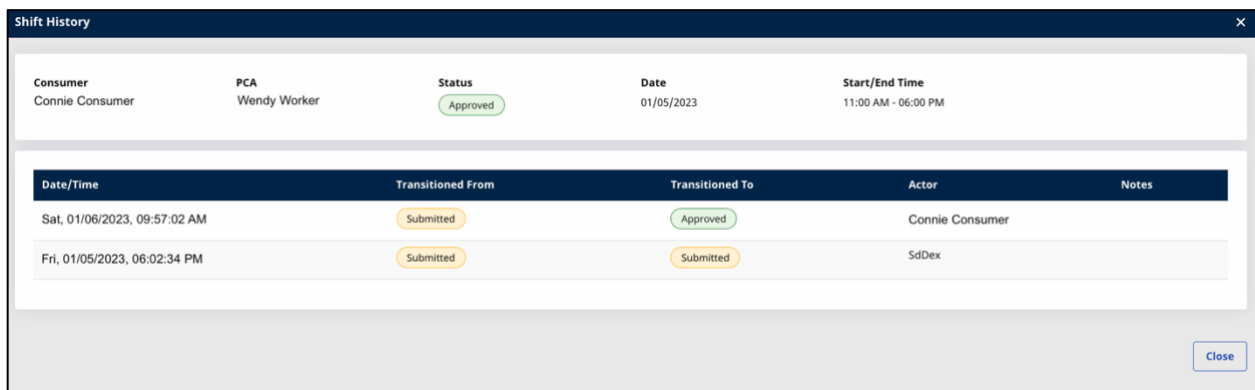
Actions Button

2. Click on **View Shift History** in the Actions popup menu.



View Shift History Button

3. A popup will appear with information on how the status of the shift has changed over time. Click the **Close** button to exit the Shift History.

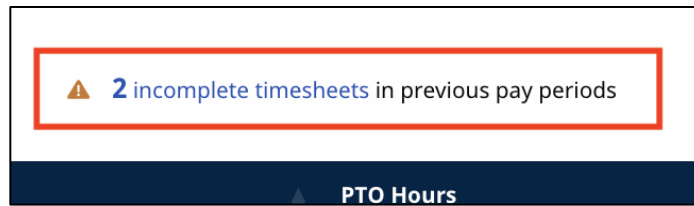


Viewing Shift History

## Approve Shifts and Submit Timesheet

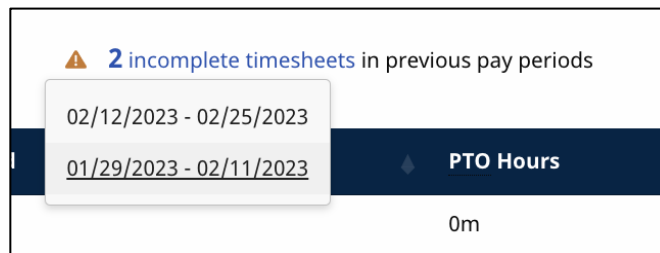
The standard setup for shift approval is that Caregivers approve their shifts automatically when they clock-out of the shift using the Mobile App. The Consumer or Representative will log in to the Services Portal to approve the time worked.

1. Starting on the Timesheets screen, Click on the **Incomplete Timesheets** link.



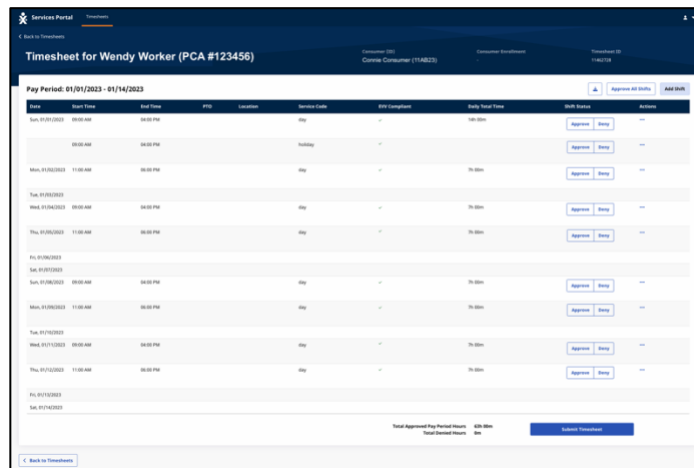
**Incomplete Timesheets Link**

2. Click on the Pay Period that you want to review.



**Pay Period Selection Popup**

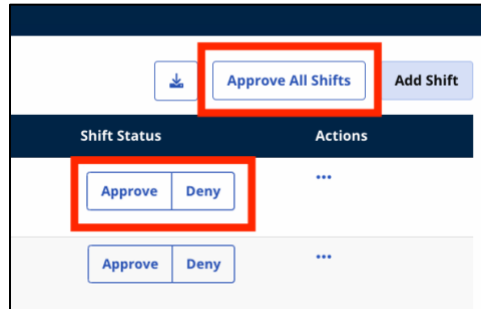
3. This will bring you to a view of the timesheet for the pay period.



**Viewing the Timesheet**

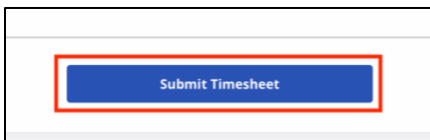


- You can approve all shifts worked at once by clicking on the **Approve All Shifts** button in the upper right of the timesheet or you can approve individual shifts by clicking on the **Approve** button next to each shift. If you have any shifts on the timesheet that are longer than 24-hours, those cannot be approved with the Approve All button. Clicking Approve all will approve all other shifts on the time sheet, then each segment of the 24+ hour shift will need to be approved with the individual Approve buttons on each line of those shifts.



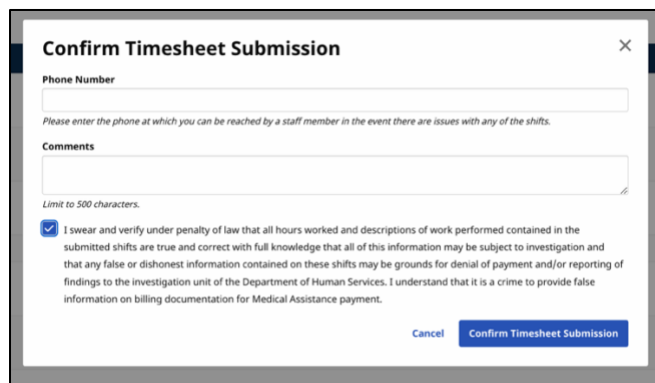
**Approval Buttons**

- Once you've approved all the shifts, Click the **Submit Timesheet** button at the bottom right corner of the page.



**Submit Timesheet Button**

- The Confirm Timesheet Submission window will popup. Mark the checkbox to certify the shifts, then click the **Confirm Timesheet Submission** Button at the bottom of the window.




**Confirm Timesheet Submission Window**

- The timesheet is now approved and submitted for payment.

## Adjust/Modify a Shift

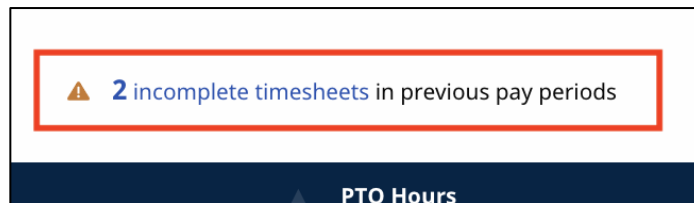
If a shift was recorded by the Caregiver using the Mobile App, but a mistake was made when the shift was recorded, you can make an edit to the shift. You could also call this modifying a shift, but the language used in the Services Portal for these changes is “Adjust”.



**DISCLAIMER**

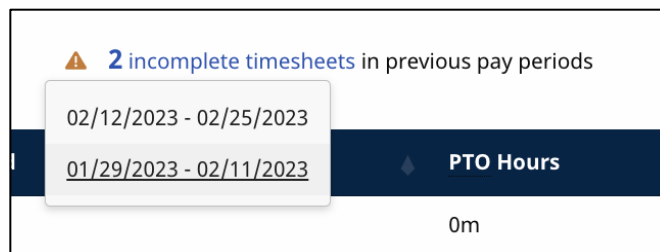
Shifts cannot be adjusted after they have been approved by the Consumer/Representative. Caregivers may adjust their own shifts before the Consumer/Representative has approved them.

1. Starting on the Timesheets screen, Click on the **Incomplete Timesheets** link.



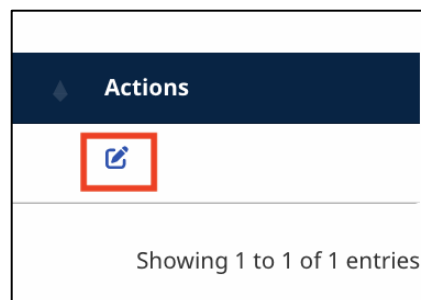
**Incomplete Timesheets Link**

2. Select the Pay Period that has the shift you want to adjust.



**Pay Period Selection**

3. Click the **Edit** link in the Actions column, which looks like a pencil in a box, for the timesheet. This will display the full timesheet for the pay period.



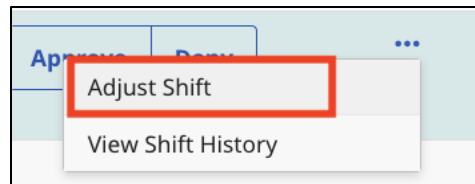
**Edit Timesheet Button**

4. Find the shift you want to adjust and click the three dots in the action column.



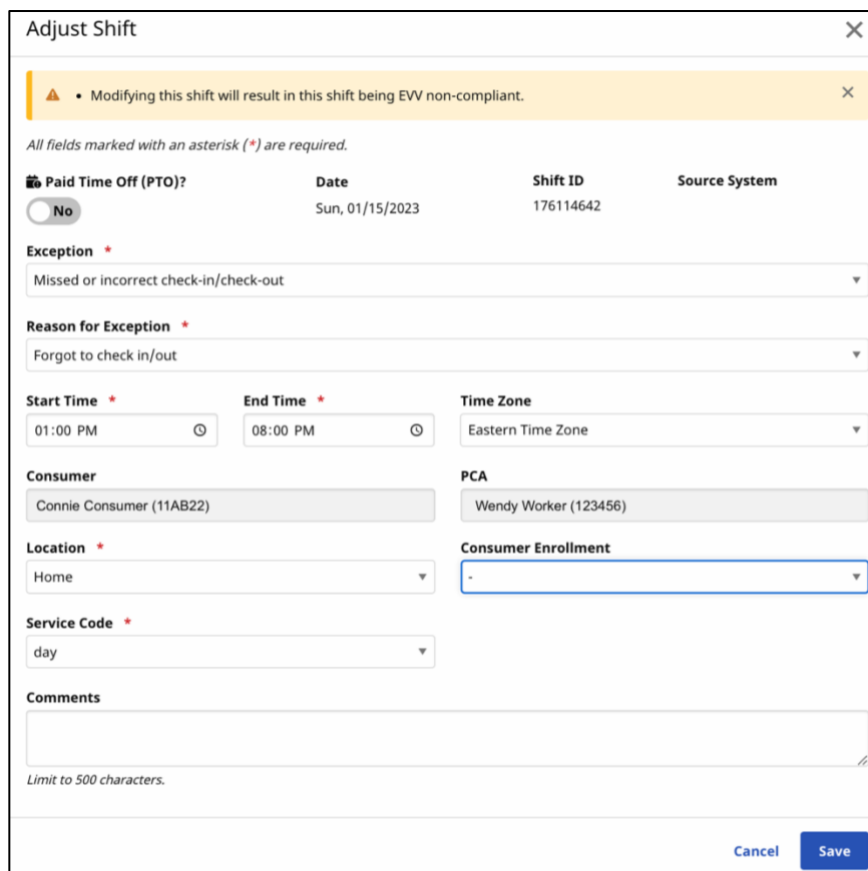
Shift Action Button

5. Click **Adjust Shift** in the popup menu.



Adjust Shift Button

- On the shift popup, select both an **Exception** and a **Reason**. The Exception explains why an adjustment is being made, and the Reason indicates why the Exception happened. Select the **Exception** and **Reason** that best match your situation. If you have concerns or questions about which option is best, contact your FMS for assistance.



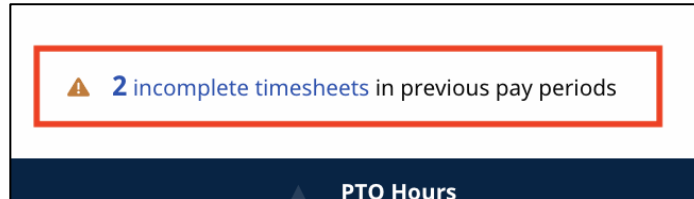
Adjust Shift Window

- After selecting the codes, you can change any of the fields that need to be adjusted. Users should leave a comment explaining the changes, which will be visible when the other party is prompted to approve the changes to the visit. Click on any field or drop-down to make a change to it.
- After you've made the changes, click the **Save** button at the bottom of the popup.
- The shift can now be approved.

## Deny a Shift

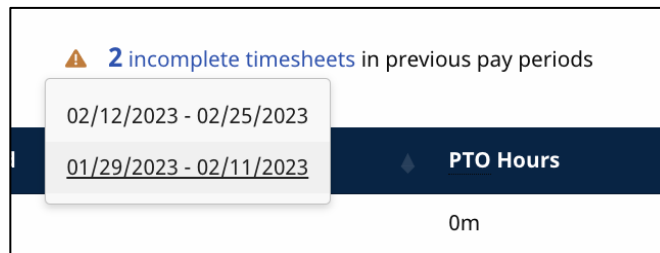
If a shift was recorded in error, it should be denied. Only Consumers and Representatives can Deny shifts.

1. Starting on the Timesheets screen, Click on the **Incomplete Timesheets** link.



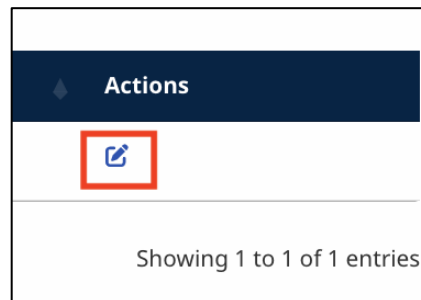
Incomplete Timesheets Link

2. Select the Pay Period that has the shift you want to deny.



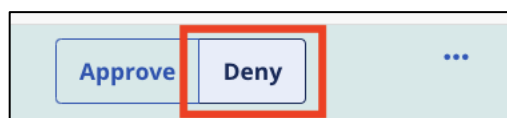
Pay Period Select

3. Click the **Edit** link in the Actions column, which looks like a pencil in a box, for the timesheet.



Edit Timesheet Button

4. Click the **Deny** button next to the shift you want to deny.



Deny Button


- In the Denial popup window, select a reason for the denial, you can optionally enter a comment about the denial, then click the **Confirm Denial** button.

Deny Shift Window

- The shift will have a denied status. If there are any other shifts to deny, repeat the process above for those shifts before submitting the timesheet.

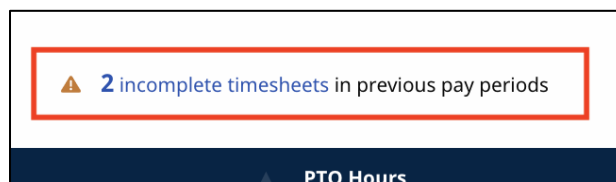
## Create a Manual Shift

This is the process to use if you are manually entering a new visit. Manual visits are normally used to record PTO or when the Caregiver couldn't record a shift using the Mobile App.



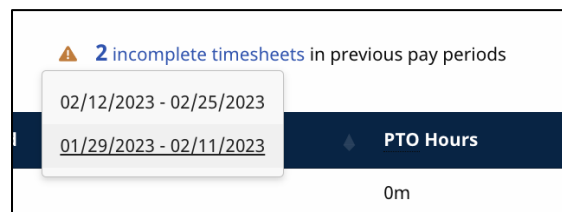
**Manual shifts are not EVV-compliant for services.  
Please avoid using manual shifts unless necessary.**

- Starting on the Timesheets screen, Click on the **Incomplete Timesheets** link.



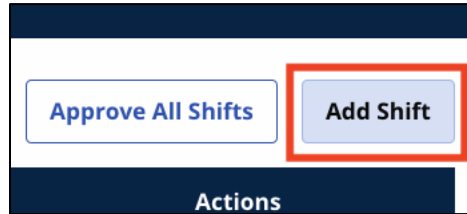
Incomplete Timesheets Link

- Select the Pay Period that has the date you need to enter a manual shift for.



Pay Period Select

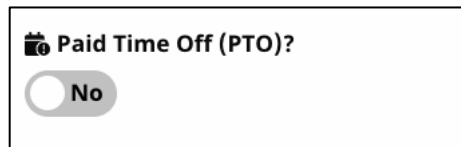
3. In the upper right corner of the screen, click the **Add Shift** button.



**Add Shift Button**

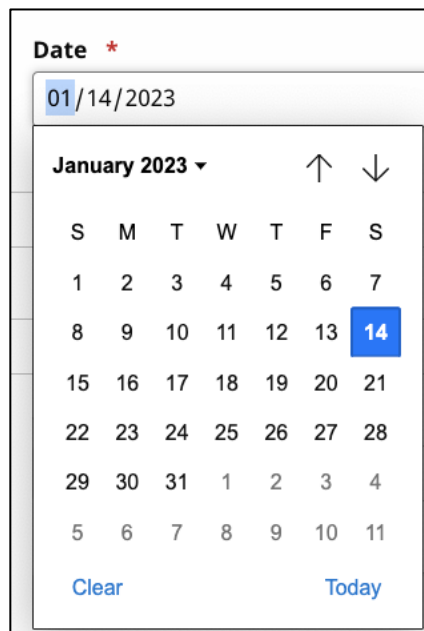
4. Fill out all required fields on the Shift popup:

- a. PTO (Optional): If this is a PTO shift, click the PTO switch to read **Yes**. If PTO = Yes, several fields not related to PTO will be hidden and will not need to be completed.



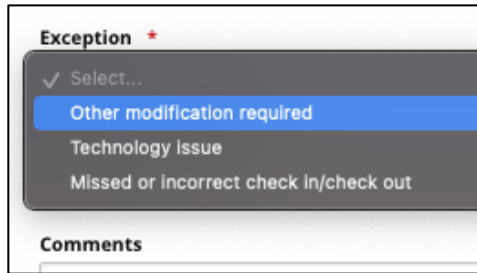
**PTO Button**

- b. **Date:** Enter the date the shift was worked. You can type the date in or use the dropdown to select the date from a calendar.



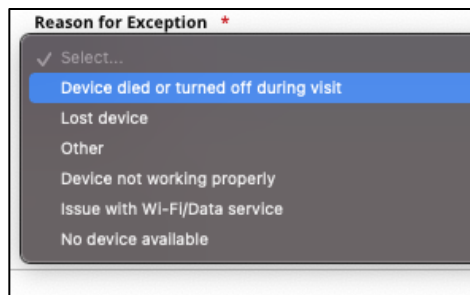
**Date Selection**

- c. **Exception:** Select the category for why the shift is be entered manually.



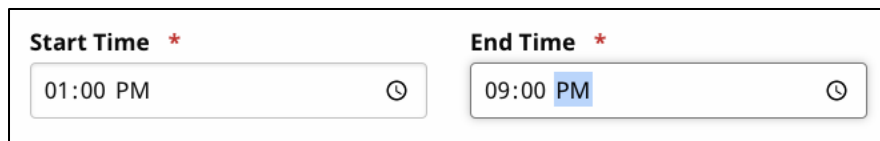
**Exception Selection**

- d. **Reason for Exception:** The reason for the exception.



**Reason Selection**

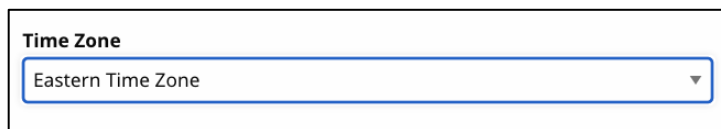
- e. **Start Time and End Time:** The time of day the shift began/ended. You can type the time in the fields or use the dropdown to select the time with a menu.



**Start and End Time Selection**




- f. **Time Zone:** This should be filled in with your Time Zone by default. If not, select your Time Zone.



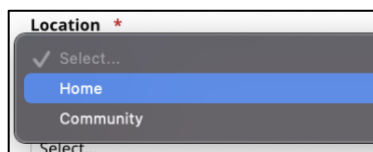
**Time Zone Select**

- g. **Consumer and PCA (Caregiver) Selection:** These will be prefilled in based on the timesheet that you are adding the shift to.



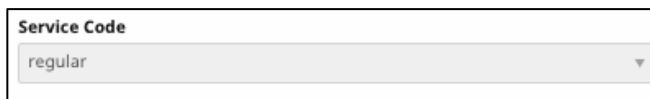
**Consumer and PCA Selection Box**

- h. **Location:** Select “Home” or “Community”, to indicate where the shift began.



**Select Location**

- i. **Service Code:** Select the service code for the service type that was worked. If your FMS Provider/Fiscal Intermediary only uses one service code, you will not be able to select/change this field.



**Service Code Selection**

- j. **Optional:** You can enter notes about the shift in the comments field.



**Comments Box**

- After completing all required fields, click **Save** at the bottom of the form.

### Add Shift ✕

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

**Paid Time Off (PTO)?**

No

**Date \***

08/25/2023 🗓

**Start Time \***

02:00 PM 🕒

**End Time \***

09:00 PM 🕒

**Time Zone**

Eastern Time Zone ▼

**Start Location \***

Community ▼

**End Location \***

Home ▼

**Consumer**

Ophelia Orange (448604)

**Consumer Enrollment**

mass\_health - ffs ▼

**Service Code**

regular ▼

**Exception \***

Technology issue ▼

**Reason for Exception \***

Device died or turned off during visit ▼

**Comments**

Limit to 500 characters.

Cancel Save

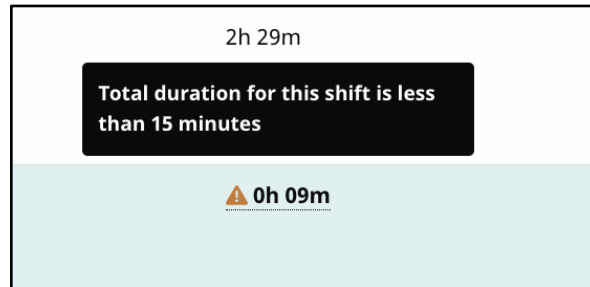
**Completed Manual Shift**

- If the Caregiver created the Manual shift, it can now be [approved](#) by the Consumer or Representative. If the Consumer or Representative created the Manual shift, it will be automatically approved once submitted.

## Special Shift Situations

### Shifts With a Warning Symbol

There are two instances when you will see a special warning on a shift. Shifts that are less than 15 minutes long and shifts that are more than 24 hours long will be flagged in the Services Portal with a warning symbol. If you hover your pointer over the shift duration, a pop up will explain the warning.



Warning Message on Shift

### Shifts Submitted on Paper

Another type of shift could appear in your shift listing. If a shift was submitted to the FMS Provider/Fiscal Intermediary in a way that is not compliant with EVV, you will not be able to edit that shift. Non-compliant shifts could have been submitted on a paper timesheet or could have been entered into the older E-Timesheets system. These shifts will automatically appear in the Services Portal as Approved shifts, and they will be flagged as EVV non-compliant.

If a shift entered this way needs to be adjusted or denied, you will need to contact the FMS Provider/Fiscal Intermediary to request that they cancel that shift. It can then be manually entered by the Caregiver or Consumer into the Services Portal using the [instructions provided earlier in this manual](#).

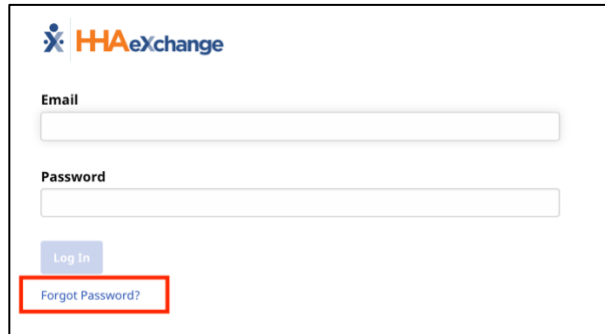
### Shifts That Run Past Midnight

When a shift begins on one day and continues through the evening hours and past midnight, the Caregiver will record it normally in the HHAExchange+ Mobile App. Once the shift is transmitted to the Services Portal, it will appear as two separate shifts. The first will run from the start of the shift until 11:59 PM. The second shift will begin at Midnight and run to the end of the shift.

## Troubleshooting

### Resetting Your Password

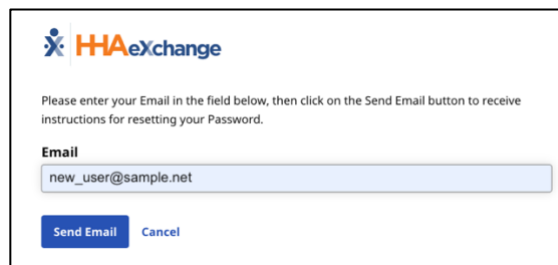
1. From the Log In Screen, click the [Forgot Password?](#) Link.



The screenshot shows the HHAexchange login interface. At the top left is the HHAexchange logo. Below it are two input fields: 'Email' and 'Password'. There is a 'Log In' button and a 'Forgot Password?' link, which is highlighted with a red rectangular box.

**Forgot Password Link**

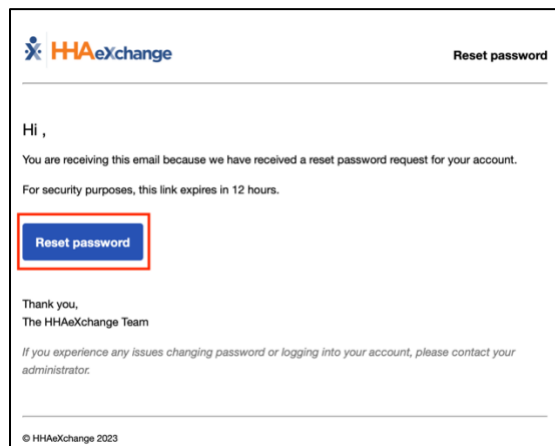
2. Enter the email address that you log in with, then click the **Send Email** button.



The screenshot shows the 'Forgot Password?' form. It includes the HHAexchange logo and a message: 'Please enter your Email in the field below, then click on the Send Email button to receive instructions for resetting your Password.' There is an 'Email' input field containing 'new\_user@sample.net'. Below the input field are two buttons: 'Send Email' (highlighted) and 'Cancel'.

**Send Password Reset Email Form**

3. A link to **Reset Password** will be sent to your email. Click on that button in the email.



The screenshot shows an email from HHAexchange titled 'Reset password'. The email body contains the following text: 'Hi ,', 'You are receiving this email because we have received a reset password request for your account.', and 'For security purposes, this link expires in 12 hours.' Below this text is a blue button labeled 'Reset password', which is highlighted with a red rectangular box. The email concludes with 'Thank you, The HHAexchange Team' and a footer: '© HHAexchange 2023'.

**Reset Password Email**

- You will be brought to a page to reset your password. Complete all fields, then click **Verify**.

### Set Password

Welcome to HHAExchange! Please create your new password below.

**Email**

**New Password**

**Confirm Password**

**Your password:**

- Can contain all ASCII/Unicode characters including emojis and spaces
- Must be 8 - 64 characters in length
- Must not contain your username
- Must not contain more than 4 repeated or sequential characters
- Must not contain any of the following words: hhaexchange, qwerty, password

**Last 4 digits of SSN**

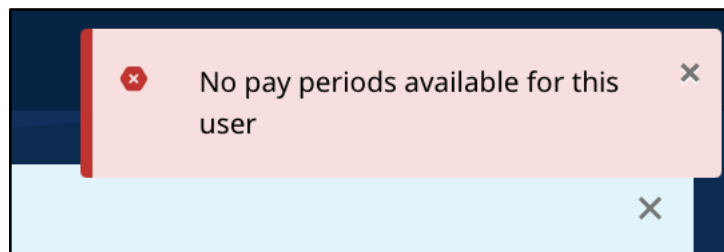
**Date Of Birth**

**Set Password Form**

- After resetting, you can log in to the Services Portal again with your email and the new password.

## No Pay Periods Available

After logging in, a warning message might appear in the upper right corner of the Services Portal window. It will state “No pay periods available for this user”. If you see this message, there is a problem with how the Consumer and Caregiver accounts are connected. Please contact the FMS Provider/Fiscal Intermediary for assistance.



**No Pay Periods Warning**

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## Cannot See Caregiver's Time in Portal

Shifts recorded with the HHAExchange+ Mobile App will appear in the Portal after the end of the shift. This usually happens within 15 minutes, but sometimes it can take longer for a shift to transfer over if there is system maintenance, or if the system is processing many shifts at the same time. If it has been more than 24 hours since the shift was ended check these items first:

- Is it possible that the Caregiver forgot to clock out of the shift?
- Verify that you are looking at the right pay period in the Services Portal.
- If you work for more than one Consumer, or if you have more than one Caregiver working for a Consumer, make sure you're looking at the correct timesheet.

If you've confirmed that the items above are correct, and you still cannot see the shift, contact the FMS Provider/Fiscal Intermediary for assistance.

## Getting an Error When Entering a Manual Shift

This error could be a system error, a pay period error, a date range error, or an error with missing required fields.

- Ensure that you are on the timesheet for the correct pay period for which you are trying to submit time.
- Ensure that all fields marked required (\*) are filled out.
- The FMS Provider/Fiscal Intermediary may have a limitation on how far back you can enter a manual shift. If you need to submit a manual shift from farther back than your FMS Provider/Fiscal Intermediary allows, you will need to contact the FMS Provider/Fiscal Intermediary for assistance.

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## Updates to this Document

Date	Description of Revision
<b>08/31/2023</b>	Updated screenshots throughout. Added special shift situations and new troubleshooting sections.
<b>04/18/2023</b>	Updated Manual shift instructions.
<b>03/06/2023</b>	Updated screenshots throughout. Accessibility improvements
<b>02/10/2023</b>	Initial version of the document