Electronic Visit Verification (EVV) Proprietary System Operator (PSO) Onboarding Overview and Timeline

Expedited Path Process for Operational Readiness Review (ORR)
Version: 1.0

This document outlines the steps required for a program provider or financial management services agency (FMSA) to onboard their EVV proprietary system (PS) in the Texas Electronic Visit Verification (EVV) operating environment managed by the Texas Health and Human Services Commission (HHSC) and Texas Medicaid & Healthcare Partnership (TMHP), through an Expedited Operational Readiness Review (ORR).

An **EVV proprietary system** is an HHSC-approved EVV system that a program provider or financial management services agency (FMSA) may use instead of an EVV vendor system that:

- Is purchased or developed by a program provider or an FMSA.
- Is used to exchange EVV data with the EVV Aggregator.
- Complies with HHSC EVV Policy as it relates to EVV Proprietary Systems.
- Complies with HHSC EVV Business Rules for Proprietary Systems.
- Complies with the requirements of Texas Government Code §531.024172 or its successors.

An EVV **Proprietary System Operator (PSO)** is a program provider or FMSA that uses an HHSC-approved EVV proprietary system.

The ORR schedule is published on the [TMHP Proprietary Systems webpage.](#) The **ORR PSO Onboarding Process** will consist of the following phases:

- Expedited ORR (to only include EVV Proprietary System connectivity testing with the EVV Aggregator)
- Operational Readiness Determination
- Deployment

The following pages provide the ORR onboarding process overview and timelines when requesting approval to use an existing operational EVV system that HHSC has previously approved.

ORR Onboarding Process Overview and Timeline
When Requesting Approval to use a previously approved Proprietary System

Program providers and FMSAs interested in participating in a PSO Onboarding session will follow this process when choosing a previously approved proprietary system from the list of <u>EVV Proprietary Systems Approved by HHSC (PDF)</u>.

Program providers and FMSAs interested in assignment to an ORR assignment must submit a EVV Proprietary System Request Form (Request Form) via the EVV Portal. **Note: The submission of a Request Form does not guarantee an assignment to a PSO ORR session. TMHP will review the submitted Request Form and PSO ORR session requirements and notify program providers and FMSAs of their assignment status.**

HHSC encourages program providers and FMSAs to read this ORR PSO Onboarding Overview and Timeline document carefully, discuss with your selected PS contact, and submit a completed Request Form as soon as possible. HHSC and TMHP will provide guidance regarding ORR participation based on analysis of the Request Form submitted by the program provider or FMSA.

HHSC is not responsible for performance or functionality of any of the EVV proprietary systems**. Program providers and FMSAs are responsible for ensuring the selected EVV proprietary system meets their business needs and for ensuring that the EVV proprietary system is in compliance with all current and future EVV Business Rules and EVV Policies.**

Task	Responsible Party	Due Date	Notes & Resources
1. Program provider or FMSA must access and review all PSO technical requirements, HHSC EVV Policy Handbook and the HHSC EVV Business Rules for Proprietary Systems. Program provider or FMSA is responsible for coordinating onboarding activities with their selected proprietary system.	Program provider or FMSA	Before submitting the EVV Proprietary System Request Form.	• <u>TMHP EVV Proprietary System Web Page</u> • <u>HHSC EVV Proprietary Systems Web Page</u> • <u>EVV Proprietary Systems Approved by HHSC</u> • <u>HHSC EVV Policy Handbook</u>
2. Program provider or FMSA must complete and submit EVV Proprietary System Request Form via EVV Portal.	Program provider or FMSA	Submit at any time.	***Note: The submission of a request form does not guarantee an assignment to a PSO Operational Readiness Review (ORR) session. TMHP will review the submitted Request Form and PSO ORR session requirements and notify program providers and FMSAs of their assignment status.**
3. Program provider or FMSA will receive a Confirmation Number (unique Request Form ID) upon successful submission of the Request Form. TMHP will review and validate information and update Request Form Status to Completed.	EVV Portal	After submission of a Request Form	• Receipt of Confirmation Number (unique Request Form ID) and a Completed Request Form Status do not guarantee assignment to an ORR Session.
4. PSOs currently onboarded with an EVV System vendor must submit a Termination Form within the timeframes required by the current EVV system vendor and before the approved Go-Live Date.	Program provider or FMSA	Per EVV system vendor Requirements	• Program provider or FMSA must reach out to their current EVV system vendor to determine requirements for submission of a Termination Form and data transfer timeframes. • Program provider or FMSA must determine go-live with the new EVV system based on termination notice and data transfer timeframe requirements of

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			the current EVV system vendor within and TMHP's go-live requirements. • Program Providers must ensure with their vendors the ability for visit maintenance and visit maintenance unlock requests.
5. TMHP informs the program provider or FMSA via email invitation, of assignment to an ORR session which consists of activities between the program provider or FMSA, HHSC, and TMHP. The ORR assignment email will include a proposed TMHP Vendor ID and EVV Portal Display Name for the program provider or FMSA to approve, the Certification Form to be signed by the Signature Authority. TMHP will request a Go-Live Date from the program provider or FMSA. Go-Live Dates must account for termination notice timeframes and data transfers from their current EVV system to the new selected PS.	HHSC, TMHP	Three weeks prior to the start of the assigned ORR Start Date	• Assignments are made based on the Request Form submission date and time, the Completed status of the Request Form, ORR requirements, and available slots for Expedited ORRs. • TMHP Vendor ID uniquely identifies each PSO in the EVV Aggregator. • EVV Portal Display Name allows PSOs to filter the data in the EVV Aggregator as displayed in the EVV Portal by their unique display name.
6. Program provider or FMSA **must confirm** the assigned ORR Session Date, the proposed TMHP Vendor ID and EVV Portal Display Name.	Program provider or FMSA, TMHP	Five business days after the HHSC ORR invitation email is sent to program provider or FMSA.	• Email to: EVV_PSO@tmhp.com
7. TMHP sets up the program provider or FMSA in the EVV Aggregator test environment with the approved TMHP Vendor ID and EVV Portal Display Name.	Program provider or FMSA, TMHP	Two weeks prior to the assigned ORR Start Date.	• TMHP has set up the testing environment for program providers or FMSA. • **Note: As per the State's policy, TMHP secure file transfer protocol (SFTP) accounts must be used to transmit EVV visit transactions every 89 calendar days to remain active. Program provider or FMSA must ensure the PS vendor has an active SFTP account. Failure to submit a test EVV visit transaction or access the system within 90 days may result in your account being deactivated and may cause a delay to re-establish connectivity and to complete the connectivity phase of the ORR.**
8. Program provider or FMSA **must submit** the signed Certification Form.	Program provider or FMSA	Start of the assigned ORR	• Email to: EVV_PSO@tmhp.com • HHSC Certification Form
9. Program provider or FMSA must ensure that their selected proprietary system vendor submits the required TMHP Connectivity technical information which includes: *NPI associated with each program*	Program provider or FMSA, TMHP	Start of the assigned ORR.	• TMHP technical support will be provided as needed.

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provider or FMSA agency that will be used during TPT if required.			
10. Program provider or FMSA and the selected proprietary system vendor must successfully submit an EVV transaction file to the TMHP testing environment to confirm the TMHP EVV System Access and Connectivity. *If the Program provider has more than one associated NPI, only one EVV transaction file is required for each unique TMHP Vendor ID.*	Program provider or FMSA, TMHP	Start of the assigned ORR.	• TMHP technical support is provided as needed. • Submitted EVV transaction file should not be rejected
11. TMHP and HHSC informs program provider or FMSA via email of HHSC's approval or denial to use the selected proprietary system to submit EVV visits to the TMHP Aggregator. TMHP provides PSO Approval or Denial Letter via email electronic attachment.	HHSC, TMHP	Following the completion of the assigned ORR.	For approval: • Program provider or FMSA is notified of their PSO Approval and Go-Live date approval. • Transmit electronic Approval Letter on HHSC letterhead to program provider's or FMSA's Signature Authority. For rejection: • Ask the program provider or FMSA if they wish to be placed on a waiting list for a future ORR session. • Transmit electronic Denial letter on HHSC letterhead to program provider's or FMSA's Signature Authority.
12. PSO may perform Data Transfer from current EVV System to new EVV System (when applicable).	PSO	As required by current EVV System before Go-Live Date.	• TMHP provides support as necessary (if transferring from the State EVV Vendor). • TMHP and PSO will work with PSO's current EVV System (when applicable) for data transfer. • TMHP will provide approval to the State EVV Vendors to provide data transfer files to the PSO (when applicable). • Program Providers must ensure with their vendors the ability for visit maintenance and visit maintenance unlock requests.
13. TMHP implements production changes for the PSO Go-Live.	TMHP	10 business days before their Go-Live date.	• TMHP sets up security access, and PSO system information (Vendor ID, Display Name, and the NPI/API to EVV System crosswalk) in the production environment for the EVV Aggregator.
14. PS Go-Live activity for the PSO(s)	Program provider or FMSA and PS Vendor	Go-Live Date	• Training of system users. • Setting up system access for all system users including PSO, HHSC and MCOs.

Task	Responsible Party	Due Date	Notes & Resources
15. TMHP and HHSC verify production system operation.	TMHP, HHSC	Go-Live Date scheduled by HHSC plus up to 30 business days.	• TMHP and HHSC monitor through internal metrics. • HHSC updates the list of EVV Proprietary Systems Approved by HHSC (if applicable) • HHSC updates the EVV Proprietary System Access and Training Guide (Excel).