



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

Standard Path Process for
Operational Readiness Review (ORR)
Version: 1.1

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 Standard Path 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 State 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 upcoming ORR schedules are published on the [TMHP Proprietary Systems webpage](#). The **Standard Path ORR PSO Onboarding Process** will consist of the following phases:

- Program providers or FMSAs participating in a Standard Path ORR must demonstrate compliance through four methods:
 - Certification – Program providers or FMSAs must certify compliance with Texas Government Code Section 531.024172, HHSC EVV Business Rules for Proprietary Systems and HHSC EVV Policy Handbook.
 - Documentation – Program providers or FMSAs must provide specified documentation for HHSC review.
 - Demonstration – Program providers or FMSAs must show system functionality using specific HHSC-approved scenarios.
 - Trading Partner Testing – Program providers or FMSAs must complete Trading Partner Testing with TMHP according to specific HHSC-approved scenarios.
- Operational Readiness Determination
- Go-Live

Please refer to HHSC EVV Proprietary System Policy: [5000, EVV Proprietary System | Texas Health and Human Services](#)

The following pages provide the ORR onboarding process overview and timelines when requesting approval to use an EVV system that HHSC has not previously approved. **The timeframe to complete the Standard Path onboarding session is 2 months between attendance at the Planning Meeting to the earliest Go-Live date.** Note: The elapsed time between a Request Form submission and the Standard Path Planning Meeting is not included in the Standard Path timeframe.

Standard Path Onboarding Process: Proprietary System Operator (PSO) Onboarding Process Overview and Timeline when requesting approval to use an EVV System that has not been previously approved by HHSC.

Program providers and financial management services agencies (FMSAs) will follow this process when choosing a system that is not on the list of [EVV Proprietary Systems Approved by HHSC](#) located on the [TMHP EVV Proprietary Systems website](#)

Task	Responsible Party	Due Date	Resources and Next Steps
1. Program provider or FMSA must access, review, and have an understanding of all PSO technical requirements, HHSC EVV Policy Handbook and the HHSC EVV Business Rules for Proprietary Systems.	Program provider or FMSA	Prior to the submission of the EVV Proprietary System Request Form	<ul style="list-style-type: none"> TMHP EVV Proprietary System Web Page HHSC EVV Proprietary Systems Web Page
2. Program providers and FMSAs must review the EVV Proprietary System Request Form with their PS Vendor and then complete, sign, and submit the EVV Proprietary System Request Form located in the EVV Portal to initiate request to start the PSO onboarding process.	Program provider or FMSA	Anytime throughout the year	<ul style="list-style-type: none"> Note: EVV Portal access is required to submit a request form. Refer to the Accessing the EVV Portal for Program Providers and FMSAs job aid for more information. Request forms that are emailed to HHSC or TMHP will not be accepted.
3. TMHP assigns the program provider or FMSA to a Standard Path Operational Readiness Review (ORR) session, which consists of a series of meetings and activities between the program provider or FMSA, HHSC and TMHP. TMHP informs the program provider or FMSA of the assignment via email.	HHSC, TMHP	45 business days prior to the assigned session	<ul style="list-style-type: none"> Session assignment occurs after receipt of the complete and validated EVV Proprietary System Request Form if a session slot is available and program provider or FMSA meet all session eligibility requirements. Note: The following EVV Proprietary System ORR Compliance Method documents may be required to pass an ORR session: <ul style="list-style-type: none"> Certification (Example) Trading Partner Testing Demonstration Documentation
4. Program provider or FMSA in conjunction with their PS Vendor must accept the Standard ORR session assignment by email to HHSC and TMHP by deadline in the invitation email.	Program provider or FMSA	5 business days after HHSC assignment email is sent to program provider or FMSA	<ul style="list-style-type: none"> Failure to respond by the deadline may result in removal from assigned ORR session. Email to: EVVPSO@hhs.texas.gov Email to: EVV_PSO@tmhp.com
5. Program provider or FMSA and their PS Vendor must successfully submit a test transaction to the TMHP testing environment to confirm TMHP EVV System Access and Connectivity.	Program provider or FMSA, TMHP	20 business days prior to the start of the assigned ORR session	<ul style="list-style-type: none"> TMHP technical support as needed TMHP to set up testing environment for program provider or FMSA Program provider or FMSA to submit a test transaction to the TMHP EVV Aggregator testing environment. Note: As per the State's policy, TMHP sftp accounts must be accessed every 89 calendar days to remain active. Failure to submit a test transaction or access the system

Task	Responsible Party	Due Date	Resources and Next Steps
			within the 90 days may result in your account being deactivated, and may cause a delay to re-establish connectivity and to complete the TPT testing phase of ORR. Failure to complete TPT testing on time would result in failure of ORR.
6. Program provider or FMSA and their PS Vendor must attend an ORR Planning Meeting with HHSC and TMHP.	Program provider or FMSA, TMHP, HHSC	10 business days prior to the assigned ORR session	<ul style="list-style-type: none"> During the Planning Meeting program provider or FMSA and their PS Vendor will be informed of all technical, Demonstration and Documentation requirements.
7. Program provider or FMSA must submit the signed customized HHSC Certification form by email to TMHP and HHSC.	Program provider or FMSA	1 st day of ORR session	<ul style="list-style-type: none"> HHSC Certification Form Email to: EVVPSO@hhs.texas.gov Email to: EVV_PSO@tmhp.com
8. Program provider or FMSA and their PS Vendor conducts ORR demonstrations with HHSC and TMHP as assigned. All required Demonstration Scenarios must be presented during Round 1.	Program provider or FMSA, TMHP, HHSC	1 st day of ORR session	<ul style="list-style-type: none"> Round 1 is 10 days (3 demos + 5 days of correction by program provider or FMSA) Round 2 is 8 days (2 demos + 5 days of correction by program provider or FMSA) Round 3 is 2 days (2 demos) Revised scoring worksheets delivered to providers/FMSAs after each demonstration round.
9. Program provider or FMSA submits ORR documentation files to HHSC for review.	Program provider or FMSA, HHSC	1 st day of ORR session	<ul style="list-style-type: none"> Documentation reviews will take place throughout the 20 days for the rounds. Revised scoring worksheets delivered to providers/FMSAs after each demonstration round.
10. ORR Trading Partner Testing (TPT) EVV Visit Transaction files are due to TMHP.	Program provider or FMSA, TMHP	Due date assigned by TMHP during Step 6	<ul style="list-style-type: none"> Program provider or FMSA required to submit EVV Transaction files to TMHP SFTP and inform TMHP of file(s) submission by COB Wednesdays throughout the scheduled ORR. Revised scoring worksheets delivered to providers/FMSAs by COB Fridays throughout the scheduled ORR.
11. TMHP informs program provider or FMSA via email of HHSC's rejection or approval to use a proprietary system to submit EVV visits to the TMHP Aggregator.	HHSC, TMHP	3 business days after completion of all components of the ORR	<p>For approval:</p> <ul style="list-style-type: none"> Program provider or FMSA is notified of their Approval and Go-Live date scheduled by HHSC. <p>For rejection:</p> <ul style="list-style-type: none"> Program provider or FMSA is asked if they wish to be placed on a waiting list for a future session
12. Program provider or FMSA and their PS Vendor to confirm Go-Live Date	Program provider or FMSA	3 business days after approval notification	<p>Program provider or FMSA and their PS Vendor must consider the following:</p> <ul style="list-style-type: none"> Current EVV System Termination requirements. Data Transfer timeframe required by current EVV System.

Task	Responsible Party	Due Date	Resources and Next Steps
			<ul style="list-style-type: none"> Time to train staff on the new EVV System.
13. TMHP informs PSO via email of HHSC's approval or rejection of the Go-Live Date.	TMHP	3 business days after Go-Live Date received from PSO	For approval: <ul style="list-style-type: none"> HHSC approval is documented via email. For rejection: <ul style="list-style-type: none"> Explanation of rejection is provided with Go-Live Date options. PSO will be directed to submit new Go-Live date for HHSC and TMHP approval within 3 business days of rejection notification email.
14. HHSC provides PSO Approval or Denial Letter via email electronic attachment.	HHSC	6 business days after PSO approval or rejection notification	For approval: <ul style="list-style-type: none"> Acceptance letter on HHSC letterhead to PSO's Signature Authority For rejection: <ul style="list-style-type: none"> Rejection letter on HHSC letterhead to program provider or FMSA Signature Authority
15. Program provider or FMSA submits signed Termination Form to current EVV System vendor to TMHP.	Program provider or FMSA	30 calendar days before Go-Live Date	<ul style="list-style-type: none"> EVV vendor Termination Forms require a signed Termination Form to be received 30 calendar days before Go-Live Date.
16. PSO must perform Data Transfer from current EVV System to new EVV System (when applicable).	PSO	30 business days before their Go-Live Date	<ul style="list-style-type: none"> TMHP provide support as necessary (if transferring from State Approved Vendor) TMHP and PSO will work with PSO's current EVV system (when applicable) for a Data Transfer plan (which must occur 30 days prior to the Go-Live date scheduled by HHSC, if confirmed on the termination form and agreed between the PSO and their current EVV System). TMHP will provide approval to EVV Vendors to provide data transfer files to the PSO (when applicable).
17. TMHP issues production credentials.	TMHP	10 business days before their Go-Live date	<ul style="list-style-type: none"> TMHP sets up security access, and PSO system information in the EVV Aggregator in production TMHP securely shares production security credentials with PSO
18. Go-Live.	PSO	Go-Live date selected by PSO	<ul style="list-style-type: none"> PS Vendor implement system changes for PSO Go-Live
19. TMHP and HHSC verify production system operation.	TMHP, HHSC	Go-Live date plus up to 30 business days	<ul style="list-style-type: none"> 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