EVV Proprietary System Operator

EVV Proprietary System
Compliance Method – Demonstration Scenarios
Version 2.1
PSO Business Rules v1.1

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Introduction

To gain Texas Health and Human Services Commission (HHSC) approval to use an Electronic Visit Verification (EVV) proprietary system (PS) to electronically document and verify the data elements for a service delivery visit, a program provider or Financial Management Services Agency (FMSA) must:
- Comply with the Texas Administrative Code (TAC) and HHSC EVV Policy as they relate to EVV proprietary systems
- Comply with the HHSC EVV Business Rules for Proprietary Systems document
- Successfully complete all steps of the Operational Readiness Review (ORR) process.

HHSC will use four methods to determine compliance during the ORR process:
- Certification
- Demonstration
- Documentation
- Trading Partner Testing (TPT) with the Texas Medicaid and Healthcare Partnership (TMHP)

This document covers the demonstration method HHSC will use to determine the compliance of an EVV proprietary system. The program provider or FMSA must successfully demonstrate that their EVV proprietary system complies with each business rule contained in this document (a subset of the business rules contained in the HHSC EVV Business Rules for Proprietary Systems document, v1.1 dated 06/04/2021), unless HHSC has explicitly waived that business rule, in whole or in part, as not applicable to its EVV proprietary system at this time (refer to your EVV Proprietary System Operator Certification Form). HHSC may also waive demonstration scenarios listed below during ORR based on the PSO responses in their PS Detailed Questionnaire. The Questions from the PS Detailed Questionnaire are referenced in the waiver statements within the scenarios where this applies. The program provider or FMSA can find references to specific questions on the PS Detailed Questionnaire within these scenarios.

Each Proprietary System Operator (PSO) will coordinate with HHSC to establish a date, time, and location for the demonstration, as well as discuss expectations for the demonstration and any technology requirements that may impact the demonstration. The PSO will complete data setup identified in step #1 of each demonstration prior to the demonstration. The PSO will perform the remaining steps in each demonstration in a live webinar. All references to Service Attendant, System User, etc. in the demonstration steps indicate a user role, all of which the PSO can demonstrate with one individual signing in using different credentials for each role.

Business Rules and Scenarios to be Demonstrated

1. EVM-3P

Business Rule

EVM-3P: EVV System must accept clock in and clock out data via Member home landline phone.

1.1. Home Landline – With Schedule

Note: HHSC may waive this scenario if the PSO is not using the Home Phone Landline Electronic Verification Method (Question 21 is No).

Demonstration Steps

1. **Data Setup in the EVV System:**
   a. Member with a home phone landline number registered in the EVV System
   b. Service Attendant profile
   c. Scheduled visit
2. **System User demonstrates, and Readiness Review (RR) team verifies that:**
   a. A Service Attendant calls the Interactive Voice Response (IVR) from the Member's home phone landline number and enters the required information to successfully record the clock in.
   b. A Service Attendant calls the IVR from the Member's home phone landline number and enters the required information to successfully record the clock out.
   c. The EVV system accurately captured the following information (per SDV-1P):
      i. Member receiving the service
      ii. Service Attendant providing the service
      iii. PSO Business Unit the Service Attendant is performing the service on behalf of
      iv. Location where the service is delivered (Member Home)
      v. Date the service is performed
      vi. Time the service is performed (clock in and clock out time)
      vii. Type of service performed (HCPCS/Modifiers and Service Group/Service Code, if applicable)
   d. The EVV system accurately captured the type of method used (Landline).
      i. The text file the EVV system will submit to the EVV Aggregator contains the visit data for this scenario. The PSO must present this text file to the ORR Team in the format the EVV system will use to transmit to the EVV Aggregator. All of the following fields should be highlighted:
         1. Position 34 INDVMBR_MEDICAID ID
         2. Position 18 EMPLOYEE_SOCSEC_ VISA_PASSPORT
         3. Position 2 PROVIDER_NPI or Position 3 PROVIDER_API
      Schedule information:
         4. Position 51 VISIT_VISITDATE
         5. Position 52 VISIT_VISITTIMEIN
         6. Position 53 VISIT_VISITTIMEOUT
         7. Position 55 VISIT_VISITLOCATION

Actual Visit information:

8. Position 68 EVV_VISITLOCATION
9. Position 60 EVV_VISITDATE
10. Position 63 EVV_CALLINTIME
11. Position 64 EVV_CALLOUTTIME
12. Position 65 EVV_ACTUALHOURS
13. Position 73 EVV_INPUTMETHOD_IN
14. Position 74 EVV_INPUTMETHOD_OUT
15. Position 58 EVV_HCPCS_CODE
16. Position 59 EVV_MODIFIER
17. Position 56 VISIT_SVCGRP (LTC FFS only)
18. Position 57 EVV_SVCCODE (LTC FFS only)
19. Position 61 EVV_CREATEDDATETIME
20. Position 62 EVV_PHONE

And the phone number that matches to the EVV_PHONE
with one of the following:

21. Position 40 INDVMBR_PHONE
22. Position 41 INDVMBR_ALTPHONE
23. Position 42 INDVMBR_ALTPHONE2

1.2. Home Landline – Without Schedule

Note: HHSC may waive this scenario if the PSO is not using the Landline Electronic Verification Method (Question 21 is No).

Demonstration Steps

1. **Data Setup in the EVV System:**
   a. Member with a home phone landline number registered in the EVV System
   b. Service Attendant profile
   c. No scheduled visit
2. **System User demonstrates, and ORR verifies that:**
   a. A Service Attendant calls the IVR from the Member's home phone landline number and enters the required information to successfully record the clock in.
   b. A Service Attendant calls the IVR from the Member's home phone landline number and enters the required information to successfully record the clock out.
   c. The EVV system accurately captured the following information (per SDV-1P):
      i. Member receiving the service
      ii. Service Attendant providing the service
      iii. PSO Business Unit the Service Attendant is performing the service on behalf of
      iv. Location where the service is delivered (home)
      v. Date the service is performed
      vi. Time the service is performed (clock in and clock out time)
      vii. Type of service performed (HCPCS/Modifiers and Service Group/Service Code, if applicable)
   d. The EVV system accurately captured the type of method used (Landline).
   e. The text file the EVV system will submit to the EVV Aggregator contains the visit data for this scenario. The PSO must present this text file to the ORR Team in the format the EVV system will use to transmit to the EVV Aggregator.
      i. All of the following fields should be highlighted:
         1. Position 34 INDVMBR_MEDICAID ID
         2. Position 18 EMPLOYEE_SOCSEC_ VISA_PASSPORT
         3. Position 2 PROVIDER_NPI or Position 3 PROVIDER_API
      Schedule information should be blank:
         4. Position 51 VISIT_VISITDATE
         5. Position 52 VISIT_VISITTIMEIN
         6. Position 53 VISIT_VISITTIMEOUT
      Actual Visit information:
         7. Position 68 EVV_VISITLOCATION
         8. Position 60 EVV_VISITDATE
         9. Position 63 EVV_CALLINTIME
         10. Position 64 EVV_CALLOUTTIME
         11. Position 65 EVV_ACTUALHOURS
         12. Position 73 EVV_INPUTMETHOD_IN
         13. Position 74 EVV_INPUTMETHOD_OUT
         14. Position 58 EVV_HCPCS_CODE
         15. Position 59 EVV_MODIFIER

16. Position 56 VISIT_SVCGRP (LTC FFS only)
17. Position 57 EVV_SVCCODE (LTC FFS only)
18. Position 62 EVV_PHONE

And the phone number that matches to the EVV_PHONE
with one of the following:

19. Position 40 INDVMBR_PHONE
20. Position 41 INDVMBR_ALTPHONE
21. Position 42 INDVMBR_ALTPHONE2

2. EVM-4P

Business Rule

EVM-4P: EVV System must verify home landline phone number on EVV Visit Transaction is associated with Member profile. If a mismatch is found, the transaction must be flagged, and the System User alerted.

2.1. Home Landline – Call Using Different Number

Note: HHSC may waive this scenario if the PSO is not using the Landline Electronic Verification Method (Question 21 is No).

Demonstration Steps

1. **Data Setup in the EVV System:**
   a. Member with a home phone landline number registered in the EVV System
   b. Service Attendant profile
2. **System User demonstrates, and ORR team validates that:**
   a. A Service Attendant calls the IVR from a different phone (not the Member's home phone landline) and enters the required information to successfully record the clock in.
   b. A Service Attendant calls the IVR from a different phone (not the Member's home landline phone) and enters the required information to successfully record the clock out.
   c. The EVV System validates the phone number and alerts the System User that the Service Attendant called from a number other than the Member's registered home phone landline number to record the clock in and clock out.

3. EVM-5P and SDV-60P

Business Rules

EVM-5P: Proprietary System Operator must provide HHSC-approved alternatives for clock in/clock out in the event a Member does not have a landline, or a Member is unwilling to allow Service Attendant to use of landline.

SDV-60P: EVV System must adhere to HHSC EVV Policy regarding Auto-Verification of EVV visit transactions and must comply with Accenture/TMHP technical specifications. Refer to Appendix P for the Accenture/TMHP technical specifications.

3.1. Alternative Device – With Schedule

Note: HHSC may waive this scenario if the PSO is not using the Alternative Device Electronic Verification Method (Question 22 is No).

Demonstration Steps

1. **Data Setup in the EVV System:**
   a. Member with an alternative device registered in the EVV System
   b. Service Attendant profile
   c. Scheduled visit
2. **System User demonstrates, and ORR Team verifies that:**
   a. A Service Attendant clocks in according to the schedule using the alternative device registered to the Member and writes down whatever information is needed.
   b. A Service Attendant calls into the EVV System (or otherwise submits the necessary information) to successfully record the clock in.
   c. A Service Attendant clocks out according to the schedule using the alternative device and writes down whatever information is needed.
   d. A Service Attendant calls into the EVV System (or otherwise submits the necessary information) to successfully record the clock out.
   e. The visit auto-verifies in the EVV system.
   f. The EVV system accurately captured the following information (per SDV-1P):
      i. Member receiving the service
      ii. Service Attendant providing the service
      iii. PSO Business Unit the Service Attendant is performing the service on behalf of
      iv. Location where the service is delivered (Member Home)
      v. Date the service is performed
      vi. Time the service is performed (clock in and clock out time)
      vii. Type of service performed (HCPCS/Modifiers and Service Group/Service Code, if applicable)
   g. The EVV system accurately captured the type of method used (Alternative Device).
   h. The text file the EVV system will submit to the EVV Aggregator contains the visit data for this scenario. The PSO must present this text file to the ORR Team in the format the EVV system will use to transmit to the EVV Aggregator.
      i. All of the following fields should be highlighted:

1. Position 34 INDVMBR_MEDICAID ID
2. Position 18 EMPLOYEE_SOCSEC_ VISA_PASSPORT
3. Position 2 PROVIDER_NPI or Position 3 PROVIDER_API

Schedule information:

4. Position 51 VISIT_VISITDATE
5. Position 52 VISIT_VISITTIMEIN
6. Position 53 VISIT_VISITTIMEOUT
7. Position 55 VISIT_VISITLOCATION

Actual Visit information:

8. Position 68 EVV_VISITLOCATION
9. Position 60 EVV_VISITDATE
10. Position 63 EVV_CALLINTIME
11. Position 64 EVV_CALLOUTTIME
12. Position 73 EVV_INPUTMETHOD_IN
13. Position 74 EVV_INPUTMETHOD_OUT
14. Position 58 EVV_HCPCS_CODE
15. Position 59 EVV_MODIFIER
16. Position 56 VISIT_SVCGRP (LTC FFS only)
17. Position 57 EVV_SVCCODE (LTC FFS only)
18. Position 75 EVV_ALTERNATIVEDEVICEID
19. Position 61 EVV_CREATEDDATETIME

3.2. Alternative Device – Without Schedule

Note: HHSC may waive this scenario if the PSO is not using the Alternative Device Electronic Verification Method (Question 22 is No).

Demonstration Steps

1. **Data Setup in the EVV System:**
   a. Member with an alternative device registered in the EVV System
   b. Service Attendant profile
   c. No scheduled visit
2. **System User demonstrates, and ORR Team verifies that:**
   a. A Service Attendant clocks in using the alternative device registered to the Member and writes down whatever information is needed.
   b. A Service Attendant calls into the EVV System (or otherwise submits the necessary information) to successfully record the clock in.
   c. A Service Attendant clocks out using the alternative device and writes down whatever information is needed.
   d. A Service Attendant calls into the EVV System (or otherwise submits the necessary information) to successfully record the clock out.
   e. The EVV system accurately captured the following information (per SDV-1P):
      i. Member receiving the service
      ii. Service Attendant providing the service
      iii. PSO Business Unit the Service Attendant is performing the service on behalf of
      iv. Location where the service is delivered (Member Home)

      v.   Date the service is performed

      vi.   Time the service is performed (clock in and clock out time)

     vii.   Type of service performed (HCPCS/Modifiers and Service Group/Service Code, if applicable)

f.   The EVV system accurately captured the type of method used (Alternative Device).

g.   The text file the EVV system will submit to the EVV Aggregator contains the visit data for this scenario. The PSO must present this text file to the ORR Team in the format the EVV system will use to transmit to the EVV Aggregator.

      i.   All of the following fields should be highlighted:

        1. Position 34 INDVMBR_MEDICAID ID

        2. Position 18 EMPLOYEE_SOCSEC_ VISA_PASSPORT

        3. Position 2 PROVIDER_NPI or Position 3 PROVIDER_API

Schedule information should be blank:

        4. Position 51 VISIT_VISITDATE

        5. Position 52 VISIT_VISITTIMEIN

        6. Position 53 VISIT_VISITTIMEOUT

Actual Visit information:

        7. Position 68 EVV_VISITLOCATION

        8. Position 60 EVV_VISITDATE

        9. Position 63 EVV_CALLINTIME

       10. Position 64 EVV_CALLOUTTIME

       11. Position 73 EVV_INPUTMETHOD_IN

       12. Position 74 EVV_INPUTMETHOD_OUT

       13. Position 58 EVV_HCPCS_CODE

       14. Position 59 EVV_MODIFIER

       15. Position 56 VISIT_SVCGRP (LTC FFS only)

       16. Position 57 EVV_SVCCODE (LTC FFS only)

       17. Position 61 EVV_CREATEDDATETIME

       18. Position 62 EVV_PHONE

       19. Position 75 EVV_ALTERNATIVEDEVICEID

4. EVM-6P

Business Rule

EVM-6P: EVV System must identify a Service Attendants use of alternative methods/devices used for clock in/clock out and confirm association to Member. If a mismatch is found, the transaction must be flagged, and the System User alerted.

4.1. Alternative Device – Not Associated with Member

Note: HHSC may waive this scenario if the PSO is not using the Alternative Device Electronic Verification Method (Question 22 is No).

Demonstration Steps

1. **Data Setup in the EVV System:**
   a. Member with an alternative device registered in the EVV System
   b. Service Attendant profile
2. **System User demonstrates, and ORR Team verifies that:**
   a. A Service Attendant clocks in using the alternative device associated with a different Member and writes down whatever information is needed.
   b. A Service Attendant calls into the EVV System (or otherwise submits the necessary information) and enters the required information.
   c. The EVV System attempts to validate that the alternative device is registered to the member and alerts the System User that a device other than the Member's registered device was used for the clock in.

5. EVM-7P, EVM-60P, EVM-21P

Business Rule

EVM-7P: Proprietary System Operator must allow clock in/clock out via mobile methods. The mobile methods must be provided at no charge to the Member.

SDV-60P: EVV System must adhere to HHSC EVV Policy regarding Auto-Verification of EVV visit transactions and must comply with Accenture/TMHP technical specifications. Refer to Appendix P for the Accenture/TMHP technical specifications.

EVM-21P: EVV System must assign the value 'Member Home' to Service Delivery Location when the EVV System verifies the Geo-Location captured using the mobile method is within the EVV Allowed Geo-perimeter.

5.1. Mobile Method – With Schedule

Note: HHSC may waive this scenario if the PSO is not using Mobile Method (Question 24 is No) or using Mobile Method but not using schedules (Question 11 is No).

Demonstration Steps

1. **Data Setup in the EVV System:**
   a. Member with a mobile method registered in the EVV System
   b. Service Attendant profile with mobile number registered in the EVV System
   c. Member Home Geo-location shown in Member profile (latitude and longitude of Member physical address)
   d. Scheduled visit
2. **System User demonstrates, and ORR Team verifies that:**
   a. A Service Attendant clocks in outside the Member Home according to the schedule using the mobile method.
      i. Service Attendant logs in and/or enters Employee EVV ID
      ii. Service Attendant enters Member EVV ID
      iii. Service Attendant enters service (optional)
   b. A Service Attendant clocks out outside the Member Home according to the schedule using the mobile method.
   c. The visit auto-verifies in the EVV system.
   d. The EVV system accurately captured the following information (per SDV-1P):
      i. Member receiving the service
      ii. Service Attendant providing the service
      iii. PSO Business Unit the Service Attendant is performing the service on behalf of
      iv. Location where the service is delivered in a community location (not the Member's home address)
      v. GPS coordinates for a location other than the Member's home address
      vi. Date the service is performed
      vii. Time the service is performed (clock in and clock out time)

        viii. Type of service performed (HCPCS/Modifiers and Service Group/Service Code, if applicable)
- e. The EVV system has accurately captured the type of method used (Mobile Method).
- f. The text file the EVV system will submit to the EVV Aggregator contains the visit data for this scenario. The PSO must present this text file to the ORR Team in the format the EVV system will use to transmit to the EVV Aggregator.
  - i. All of the following fields should be highlighted:
    1. Position 34 INDVMBR_MEDICAID ID
    2. Position 18 EMPLOYEE_SOCSEC_ VISA_PASSPORT
    3. Position 2 PROVIDER_NPI or Position 3 PROVIDER_API

    Schedule information:
    4. Position 51 VISIT_VISITDATE
    5. Position 52 VISIT_VISITTIMEIN
    6. Position 53 VISIT_VISITTIMEOUT
    7. Position 55 VISIT_VISITLOCATION

    Actual Visit information:
    8. Position 68 EVV_VISITLOCATION
    9. Position 60 EVV_VISITDATE
    10. Position 63 EVV_CALLINTIME
    11. Position 64 EVV_CALLOUTTIME
    12. Position 73 EVV_INPUTMETHOD_IN
    13. Position 74 EVV_INPUTMETHOD_OUT
    14. Position 58 EVV_HCPCS_CODE
    15. Position 59 EVV_MODIFIER
    16. Position 56 VISIT_SVCGRP (LTC FFS only)
    17. Position 57 EVV_SVCCODE (LTC FFS only)
    18. Position 61 EVV_CREATEDDATETIME
    19. Position 62 EVV_PHONE
    20. Position 69 EVV_VISIT_LATITUDE_IN
    21. Position 70 EVV_VISIT_LONGITUDE_IN
    22. Position 116 EVV_VISIT_LATITUDE_OUT
    23. Position 117 EVV_VISIT_LONGITUDE_OUT
    24. Position 72 EVV_LAT_LONG_MATCH_IN
    25. Position 120 EVV_LAT_LONG_MATCH_OUT

5.2. Mobile Method – At Member Home Without Schedule

Note: HHSC may waive this scenario if the PSO is not using the Mobile Electronic Verification Method (Question 24 is No).

Demonstration Steps

1. **Data Setup in the EVV System:**
   - a. Member with a mobile method registered in the EVV System
   - b. Service Attendant profile with mobile number registered in the EVV System

      c. Member Home Geo-location shown in Member profile (latitude and longitude of Member physical address)

      d. No scheduled visit

2. System User demonstrates, and ORR Team verifies that:

      a. A Service Attendant clocks in from the Member Home using the mobile method.

           i. Service Attendant logs in and/or enters Employee EVV ID

           ii. Service Attendant enters Member EVV ID

           iii. Service Attendant enters location as Member Home (optional)

           iv. Service Attendant enters service (optional)

      b. A Service Attendant clocks out from the Member Home using the mobile method.

      c. The EVV system accurately captured the following information (per SDV-1P):

           i. Member receiving the service

           ii. Service Attendant providing the service

           iii. PSO Business Unit the Service Attendant is performing the service on behalf of

           iv. Location where the service is delivered (home or community location, and correct GPS coordinates)

           v. Date the service is performed

           vi. Time the service is performed (clock in and clock out time)

           vii. Type of service performed (HCPCS/Modifiers and Service Group/Service Code, if applicable)

      d. The EVV system has accurately captured the type of method used (Mobile Method) and the visit auto-verifies.

      e. The text file the EVV system will submit to the EVV Aggregator contains the visit data for this scenario. The PSO must present this text file to the ORR Team in the format the EVV system will use to transmit to the EVV Aggregator.

           i. All of the following fields should be highlighted:

               1. Position 34 INDVMBR_MEDICAID ID

               2. Position 18 EMPLOYEE_SOCSEC_ VISA_PASSPORT

               3. Position 2 PROVIDER_NPI or Position 3 PROVIDER_API

Schedule information should be blank:

               4. Position 51 VISIT_VISITDATE

               5. Position 52 VISIT_VISITTIMEIN

               6. Position 53 VISIT_VISITTIMEOUT

Actual Visit information:

               7. Position 68 EVV_VISITLOCATION

               8. Position 60 EVV_VISITDATE

               9. Position 63 EVV_CALLINTIME

               10. Position 64 EVV_CALLOUTTIME

               11. Position 73 EVV_INPUTMETHOD_IN

               12. Position 74 EVV_INPUTMETHOD_OUT

               13. Position 58 EVV_HCPCS_CODE

               14. Position 59 EVV_MODIFIER

               15. Position 56 VISIT_SVCGRP (LTC FFS only)

               16. Position 57 EVV_SVCCODE (LTC FFS only)

               17. Position 62 EVV_PHONE

               18. Position 69 EVV_VISIT_LATITUDE_IN

19. Position 70 EVV_VISIT_LONGITUDE_IN
20. Position 116 EVV_VISIT_LATITUDE_OUT
21. Position 117 EVV_VISIT_LONGITUDE_OUT
22. Position 72 EVV_LAT_LONG_MATCH_IN
23. Position 120 EVV_LAT_LONG_MATCH_OUT

5.3. Mobile Method – Clock In and Clock Out at Member's Home

Note: HHSC may waive this scenario if the PSO is not using the Mobile Electronic Verification Method (Question 24 is No).

Demonstration Steps

1. **Data Setup in the EVV System:**
    a. Member with a mobile method registered in the EVV System
    b. Service Attendant profile with a mobile number registered in the EVV System
    c. Member's Home Geo-location shown in Member profile (latitude and longitude of Member's physical address)
    d. No scheduled visit
2. **System User demonstrates, and ORR Team verifies that:**
    a. A Service Attendant clocks in using the mobile method within 250 feet from the Member's Home.
        i. Service Attendant logs in and/or enters the Employee EVV ID
        ii. Service Attendant enters the Member EVV ID
        iii. Service Attendant enters service (optional)
        iv. Service Attendant enters 'Member Home' as the Service Delivery Location
    b. A Service Attendant clocks out using the mobile method within 250 feet from the Member Home.
    c. Mobile method identifies location as Member Home since it is within 250 feet of the Member's home.
    d. The visit auto-verifies in the EVV system.
        i. The EVV system has accurately determined that the Service Attendant is in the Member Home.
            1. The visit should auto-verify if within 250 feet and location = Member Home
    e. The EVV system accurately captured the following information (per SDV-1P):
        i. Member receiving the service
        ii. Service Attendant providing the service
        iii. PSO Business Unit the Service Attendant is performing the service on behalf of
        iv. Location where the service is delivered is identified as Member Home
        v. Date the service is performed
        vi. Time the service is performed (clock in and clock out time)
        vii. Type of service performed (HCPCS/Modifiers and Service Group/Service Code, if applicable)
    f. The EVV system has accurately captured the type of method used (Mobile Method).

g. The text file the EVV system will submit to the EVV Aggregator contains the visit data for this scenario. The PSO must present this text file to the ORR Team in the format the EVV system will use to transmit to the EVV Aggregator.

    i. All of the following fields should be highlighted:
1. Position 34 INDVMBR_MEDICAID ID
2. Position 18 EMPLOYEE_SOCSEC_ VISA_PASSPORT
3. Position 2 PROVIDER_NPI or Position 3 PROVIDER_API
4. Schedule information should be blank:
5. Position 51 VISIT_VISITDATE
6. Position 52 VISIT_VISITTIMEIN
7. Position 53 VISIT_VISITTIMEOUT

Actual Visit information:
8. Position 68 EVV_VISITLOCATION
9. Position 60 EVV_VISITDATE
10. Position 63 EVV_CALLINTIME
11. Position 64 EVV_CALLOUTTIME
12. Position 73 EVV_INPUTMETHOD_IN
13. Position 74 EVV_INPUTMETHOD_OUT
14. Position 58 EVV_HCPCS_CODE
15. Position 59 EVV_MODIFIER
16. Position 56 VISIT_SVCGRP (LTC FFS only)
17. Position 57 EVV_SVCCODE (LTC FFS only)
18. Position 62 EVV_PHONE
19. Position 69 EVV_VISIT_LATITUDE_IN
20. Position 70 EVV_VISIT_LONGITUDE_IN
21. Position 116 EVV_VISIT_LATITUDE_OUT
22. Position 117 EVV_VISIT_LONGITUDE_OUT
23. Position 72 EVV_LAT_LONG_MATCH_IN
24. Position 120 EVV_LAT_LONG_MATCH_OUT
25. Position 114 EVV_AUTOCONFIRMFLAG

5.4. Mobile Method – Clock In and Clock Out more than 250 feet from Member's Home

Note: HHSC may waive this scenario if the PSO is not using the Mobile Electronic Verification Method (Question 24 is No).

Demonstration Steps

1. **Data Setup in the EVV System:**
    i. Member with a mobile method registered in the EVV System
    ii. Service Attendant profile with mobile number registered in EVV System
    iii. Member's Home Geo-location shown in Member profile (latitude and longitude of Member's physical address)
    iv. No scheduled visit
2. **System User demonstrates, and ORR Team verifies that:**
    a. A Service Attendant clocks in using the mobile method, but more than 250 feet from the Member's Home.

              i.   Service Attendant logs in and/or enters the Employee ID
              ii.   Service Attendant enters the Member ID
              iii.   Service Attendant enters service (optional)

b. A Service Attendant clocks out using the mobile method, but more than 250 feet from the Member's Home.

c. Service Attendant selects Location as Member Home using the mobile method.

d. The visit does not auto-verify in the EVV system.
              i.   The EVV System has accurately determined that the Service Attendant is not in the Member Home based on the Geo-location.

e. The EVV system accurately captured the following information (per SDV-1P):
              i.   Member receiving the service
              ii.   Service Attendant providing the service
              iii.   PSO Business Unit the Service Attendant is performing the service on behalf of
              iv.   Location where the service is delivered is identified as Member Home
              v.   Date the service is performed
              vi.   Time the service is performed (clock in and clock out time)
              vii.   Type of service performed (HCPCS/Modifiers and Service Group/Service Code, if applicable)

f. The EVV System has accurately captured the type of method used (Mobile Method).

g. The System User confirms the visit as occurring in the Member Home.

h. The System User enters Reason Code 300-F *Malfunctioning mobile device/application* with Free Text.

i. The text file the EVV system will submit to the EVV Aggregator contains the visit data for this scenario. The PSO must present this text file to the ORR Team in the format the EVV system will use to transmit to the EVV Aggregator.
              i.   All of the following fields should be highlighted:
                  1.   Position 34 INDVMBR_MEDICAID ID
                  2.   Position 18 EMPLOYEE_SOCSEC_ VISA_PASSPORT
                  3.   Position 2 PROVIDER_NPI or Position 3 PROVIDER_API

Schedule information should be blank:
                  4.   Position 51 VISIT_VISITDATE
                  5.   Position 52 VISIT_VISITTIMEIN
                  6.   Position 53 VISIT_VISITTIMEOUT

Actual Visit information:
                  7.   Position 68 EVV_VISITLOCATION
                  8.   Position 60 EVV_VISITDATE
                  9.   Position 63 EVV_CALLINTIME
                  10. Position 64 EVV_CALLOUTTIME
                  11. Position 73 EVV_INPUTMETHOD_IN
                  12. Position 74 EVV_INPUTMETHOD_OUT
                  13. Position 58 EVV_HCPCS_CODE
                  14. Position 59 EVV_MODIFIER
                  15. Position 56 VISIT_SVCGRP (LTC FFS only)
                  16. Position 57 EVV_SVCCODE (LTC FFS only)
                  17. Position 62 EVV_PHONE
                  18. Position 69 EVV_VISIT_LATITUDE_IN

19. Position 70 EVV_VISIT_LONGITUDE_IN
20. Position 116 EVV_VISIT_LATITUDE_OUT
21. Position 117 EVV_VISIT_LONGITUDE_OUT
22. Position 72 EVV_LAT_LONG_MATCH_IN
23. Position 120 EVV_LAT_LONG_MATCH_OUT
24. Position 114 EVV_AUTOCONFIRMFLAG

Note: If there is more than one reason code on the visit, highlight the reason code fields for this scenario.

25. Position 76 EVV_REASONCODE1
26. Position 77 EVV_REASONCODE1DESC
27. Position 78 EVV_REASONCODE1COMMENT

6. SDV-4P, SDV-48P, SDV-53P, SDV-21P

Business Rules

SDV-4P: EVV System must allow for manual data entry of EVV Visit Transactions. All EVV Visit Transactions entered using this manual method must identify the input method and output method as "GUI" (manual entry). EVV System must require extra certification that supporting documentation is available when the visit is manually entered by the System User.

SDV-48P: EVV System must require entry of a Reason Code when changes are made to the service delivery transaction after the System User/Service Attendant has documented the visit.

SDV-53P: EVV System must use bill time in and bill time out, when entered, to calculate billed hours in the same manner as actual service delivery time is calculated.

SDV-21P: EVV System must restrict the System User from performing Visit Maintenance on the following fields at a minimum:
- Actual service delivery date
- Actual service delivery clock in time
- Actual service delivery clock out time
- Actual hours worked
- Auto-populated data fields
- GPS coordinates

6.1. Manually Entered Visit Transaction (GUI)

Demonstration Steps

1. **Data Setup in the EVV System:**
    a. Member Profile
    b. Service Attendant Profile
2. Member must have a schedule **System User demonstrates, and ORR Team verifies that:**
    a. A Service Attendant fails to use EVV to clock in and clock out.
    b. The System User manually enters the visit transaction as follows:
        i. Enters all required visit data
            1. Member information
            2. Service Attendant information
            3. Service
            4. Date of visit must be within visit maintenance timeframe of 95 days
            5. Bill hours
        ii. Enters Reason Code 600 (Other)
        iii. Enters Free Text and required information for this Reason Code:
            1. Why the use of this reason code was required and
            2. Actual clock in and clock out time not electronically captured
    c. The EVV System accepts the visit transaction.
    d. The EVV system accurately captured the following information (per SDV-1P):

        i.   Member receiving the service

        ii.   Service Attendant providing the service

        iii.   PSO Business Unit the Service Attendant is performing the service on behalf of

        iv.   Location where the service is delivered (home or community location)

        v.   Date the service is performed

        vi.   Time the service is performed (clock in and clock out time captured in Free Text)

        vii.   Type of service performed (HCPCS/Modifiers and Service Group/Service Code, if applicable)

e.   The EVV system accurately captured the following information:

        i.   Type of method used to clock in (GUI)

        ii.   Type of method used to clock out (GUI)

        iii.   Certification that supporting documentation is available

        iv.   Reason Code 600 (Other) and Free text in the comment field including the time the Service Attendant performed the service (clock in and clock out date/time).

f.   The text file the EVV system will submit to the EVV Aggregator contains the visit data for this scenario. The PSO must present this text file to the ORR Team in the format the EVV system will use to transmit it to the EVV Aggregator. ORR Team will verify that the EVV system does not capture data for EVV_CALLINTIME, EVV_CALLOUTTIME, and EVV_ACTUALHOURS for the manual visit.

        i.   All of the following fields should be highlighted:

            1. Position 34 INDVMBR_MEDICAID ID

            2. Position 18 EMPLOYEE_SOCSEC_ VISA_PASSPORT

            3. Position 2 PROVIDER_NPI or Position 3 PROVIDER_API

Schedule information:

            4. Position 51 VISIT_VISITDATE

            5. Position 52 VISIT_VISITTIMEIN

            6. Position 53 VISIT_VISITTIMEOUT

            7. Position 55 VISIT_VISITLOCATION

Actual Visit information:

            8. Position 68 EVV_VISITLOCATION

            9. Position 60 EVV_VISITDATE

            10. Position 63 EVV_CALLINTIME (should be blank)

            11. Position 64 EVV_CALLOUTTIME (should be blank)

            12. Position 65 EVV_ACTUALHOURS (should be blank)

            13. Position 73 EVV_INPUTMETHOD_IN

            14. Position 74 EVV_INPUTMETHOD_OUT

            15. Position 58 EVV_HCPCS_CODE

            16. Position 59 EVV_MODIFIER

            17. Position 56 VISIT_SVCGRP (LTC FFS only)

            18. Position 57 EVV_SVCCODE (LTC FFS only)

            19. Position 66 EVV_PAYHOURS (Bill Hours)

            20. Position 61 EVV_CREATEDDATETIME

            21. Position 108 EVV_LASTVISITMAINT

            22. Position 114 EVV_AUTOCONFIRMFLAG

Note: If there is more than one reason code on the visit, highlight the reason code fields for this scenario.

23. Position 76 EVV_REASONCODE1
24. Position 77 EVV_REASONCODE1DESC
25. Position 78 EVV_REASONCODE1COMMENT

7. SDV-7P

Business Rule

SDV-7P: EVV System must allow the System User the ability to adjust billed hours in cases where Service Attendant clock in/clock out were not appropriate. The billed hours may not be adjusted by the System User to an amount greater than the actual hours recorded by the EVV System.

7.1. Adjust Bill Hours – Greater Than Actual Hours

Demonstration Steps

1. **Data Setup in the EVV System:**
   a. Member
   b. Service Attendant profile
   c. Scheduled visit
   d. Service Attendant clocked in and clocked out for a visit one (1) hour in duration
2. **System User demonstrates, and ORR Team validates that:**
   a. System User performs the following visit maintenance on the visit transaction created in step #1:
      i. Attempts to enter a value of two (2) hours in the bill hours field within the EVV System (one hour greater than the actual hours captured in the EVV System)
   b. EVV System does not allow entry in bill hours for more than the actual hours.
   c. The text file the EVV system will submit to the EVV Aggregator contains the visit data for this scenario. The PSO must present this text file to the ORR Team in the format the EVV system will use to transmit it to the EVV Aggregator.
      i. ORR Team will verify that the EVV system does not record any changes to the visit record.

7.2. Adjust Bill Hours – Less Than Actual Hours

Demonstration Steps

1. **Data Setup in the EVV System:**
   a. Member
   b. Service Attendant profile
   c. Scheduled visit
   d. Service Attendant clocked in and clocked out for a visit of two (2) hours in duration
2. **System User demonstrates, and ORR Team verifies that:**
   a. A System User can perform the following visit maintenance on the visit transaction created in step #1:
      i. Enters a value of one (1) hour in the bill hours field within the EVV System (one (1) hour less than the actual hours captured in the EVV System)
      ii. Enters Reason Code 100 (Service Variation) and Reason Code Description "B - Downward adjustment of pay hours."
      iii. Enters required free text comments

b. The EVV System accepts the changes to the visit transaction.
c. The EVV system has accurately captured the following information:
    i. Bill hours amount equals one (1) hour
    ii. Reason Code number 100 and description "B - Downward adjustment of pay hours." and additional comments
    iii. Last Visit Maintenance date is equal to the demonstration date
d. The text file the EVV system will submit to the EVV Aggregator contains the changed bill hours within the visit data for this scenario. The PSO must present this text file to the ORR Team in the format the EVV system will use to transmit it to the EVV Aggregator.
    i. All of the following fields should be highlighted:
        1. Position 34 INDVMBR_MEDICAID ID
        2. Position 18 EMPLOYEE_SOCSEC_ VISA_PASSPORT
Schedule information:
        3. Position 51 VISIT_VISITDATE
        4. Position 52 VISIT_VISITTIMEIN
        5. Position 53 VISIT_VISITTIMEOUT
Actual Visit information:
        6. Position 68 EVV_VISITLOCATION
        7. Position 60 EVV_VISITDATE
        8. Position 61 EVV_CREATEDDATETIME
        9. Position 63 EVV_CALLINTIME
        10. Position 64 EVV_CALLOUTTIME
        11. Position 65 EVV_ACTUALHOURS
        12. Position 73 EVV_INPUTMETHOD_IN
        13. Position 74 EVV_INPUTMETHOD_OUT
        14. Position 58 EVV_HCPCS_CODE
        15. Position 59 EVV_MODIFIER
        16. Position 56 VISIT_SVCGRP (LTC FFS only)
        17. Position 57 EVV_SVCCODE (LTC FFS only)
        18. Position 66 EVV_PAYHOURS (Bill Hours)
        19. Position 108 EVV_LASTVISITMAINT
        20. Position 114 EVV_AUTOCONFIRMFLAG
Note: If there is more than one reason code on the visit, highlight the reason code fields for this scenario.
        21. Position 76 EVV_REASONCODE1
        22. Position 77 EVV_REASONCODE1DESC
        23. Position 78 EVV_REASONCODE1COMMENT

8. SDV-19P, SDV-49P, SDV-50P

Business Rules & Policy References

SDV-19P: EVV System must adhere to the HHSC EVV Policy Handbook in regard to Call Matching Window.

SDV-49P: EVV System must adhere to the HHSC EVV Policy Handbook in regard to Optional Expanded Time for Auto-Verification if the Proprietary System Operator chooses to implement this optional Visit Maintenance reduction solution.

SDV-50P: EVV System must adhere to the HHSC EVV Policy Handbook in regard to Optional Automatic Downward Adjustment if the Proprietary System Operator chooses to implement this optional Visit Maintenance reduction solution.

8.1. Auto-Verify – Call Matching Window

Demonstration Steps

1. **Data Setup in the EVV System:**
   a. Member
   b. Service Attendant
   c. Call Matching Window policy is in effect with no other Visit Maintenance reduction options enabled in the EVV System.
   d. Scheduled visit for 10 AM to Noon (2 hours in duration)
   e. The Service Attendant clocked in at 8:00 AM and clocked out at 10:07 AM (total hours worked 2 hours and 7 minutes)
2. **System User demonstrates, and ORR Team verifies that:**
   a. The EVV system automatically rounded down the total duration of the visit hours to 2.0 bill hours (the system rounds down if seven minutes or less).
   b. The rounded bill hours match the scheduled visit duration.
   c. The EVV system auto-verifies the visit transaction (ready to transmit to the EVV Aggregator without user intervention).
   d. The text file the EVV system will submit to the EVV Aggregator contains the visit data for this scenario. The PSO must present this text file to the ORR Team in the format the EVV system will use to transmit to the EVV Aggregator.
      i. All of the following fields should be highlighted:
         1. Position 34 INDVMBR_MEDICAID ID
         2. Position 18 EMPLOYEE_SOCSEC_ VISA_PASSPORT
      Schedule information:
         3. Position 51 VISIT_VISITDATE
         4. Position 52 VISIT_VISITTIMEIN
         5. Position 53 VISIT_VISITTIMEOUT
         6. Position 54 VISIT_VISITHOURS
      Actual Visit information:
         7. Position 60 EVV_VISITDATE
         8. Position 61 EVV_CREATEDDATETIME

      9. Position 63 EVV_CALLINTIME
     10. Position 64 EVV_CALLOUTTIME
     11. Position 65 EVV_ACTUALHOURS
     12. Position 66 EVV_PAYHOURS (Bill Hours)
     13. Position 108 EVV_LASTVISITMAINT (should be blank)
     14. Position 114 EVV_AUTOCONFIRMFLAG

8.2. No-Auto-Verify – Call Matching Window

<u>Demonstration Steps</u>

1. **Data Setup in the EVV System:**
   a. Member
   b. Service Attendant
   c. Call Matching Window policy is in effect with no other Visit Maintenance reduction options enabled in the EVV System.
   d. Scheduled visit for 10:00 AM to Noon (2 hours in duration)
   e. The Service Attendant clocked in at 8 AM and clocked out at 10:08 AM (total hours worked 2 hours and 8 minutes)
2. **System User demonstrates, and ORR Team verifies that:**
   a. The EVV system automatically rounded up the total duration of the visit to 2.25 bill hours (the system rounds up if eight minutes or more) . Actual hours remain at 2 hours 8 minutes.
   b. The EVV system does not auto-verify the visit transaction since the bill hours (2.25) do not match the scheduled visit duration (2 hours) requiring user intervention.
   c. The System User confirms the visit as the correct hours worked.
   d. The System User enters Reason Code 100-A *Staff hours worked differ from schedule* (thus retaining the 2.25 hours).
   e. The text file the EVV system will submit to the EVV Aggregator contains the visit data for this scenario with bill hours as 2.25. The PSO must present this text file to the ORR Team in the format the EVV system will use to transmit to the EVV Aggregator.
      i. All of the following fields should be highlighted:
         1. Position 34 INDVMBR_MEDICAID ID
         2. Position 18 EMPLOYEE_SOCSEC_ VISA_PASSPORT
     Schedule information:
         3. Position 51 VISIT_VISITDATE
         4. Position 52 VISIT_VISITTIMEIN
         5. Position 53 VISIT_VISITTIMEOUT
     Actual Visit information:
         6. Position 68 EVV_VISITLOCATION
         7. Position 60 EVV_VISITDATE
         8. Position 63 EVV_CALLINTIME
         9. Position 64 EVV_CALLOUTTIME
        10. Position 65 EVV_ACTUALHOURS
        11. Position 73 EVV_INPUTMETHOD_IN
        12. Position 74 EVV_INPUTMETHOD_OUT
        13. Position 58 EVV_HCPCS_CODE

14. Position 59 EVV_MODIFIER
15. Position 56 VISIT_SVCGRP (LTC FFS only)
16. Position 57 EVV_SVCCODE (LTC FFS only)
17. Position 66 EVV_PAYHOURS (Bill Hours)
18. Position 108 EVV_LASTVISITMAINT
19. Position 114 EVV_AUTOCONFIRMFLAG

Note: If there is more than one reason code on the visit, highlight the reason code fields for this scenario.

1. Position 76 EVV_REASONCODE1
2. Position 77 EVV_REASONCODE1DESC
3. Position 78 EVV_REASONCODE1COMMENT

8.3. Auto-Verify – Expanded Time for Auto-verification

Note: HHSC may waive this scenario if the PSO has indicated they do not wish to use this Optional Visit Maintenance Reduction option (Question 12 is No).

Demonstration Steps

1. **Data Setup in the EVV System:**
   a. Member
   b. Service Attendant
   c. Optional Expanded Time for Auto-Verification (a Visit Maintenance reduction option) is enabled in the EVV System with no other options enabled.
   d. Scheduled visit for 1:00 PM to 3:00 PM (2 hours in duration).
   e. Due to the Call Matching Window policy the Service Attendant can clock in and out anytime between 12 a.m. - 11:59 p.m.
      i. Service Attendant clocks in and clocks out for a total duration of 2 hours and 11 minutes.

2. **System User demonstrates, and ORR Team verifies that:**
   a. The EVV system automatically rounded up the total duration of the visit to 2.25 bill hours (the system rounds up if eight minutes or more) . Actual hours remain at 2 hours 11 minutes.
   b. The EVV system auto-verifies the visit transaction due to the enabling of the 'Optional Expanded Time for Auto-Verification'.
   c. The text file the EVV system will submit to the EVV Aggregator contains the visit data for this scenario with bill hours as 2.25 and actual hours as 2.18. The PSO must present this text file to the ORR Team in the format the EVV system will use to transmit to the EVV Aggregator.
      i. All of the following fields should be highlighted:
         1. Position 34 INDVMBR_MEDICAID ID
         2. Position 18 EMPLOYEE_SOCSEC_ VISA_PASSPORT
      Schedule information:
         3. Position 51 VISIT_VISITDATE
         4. Position 52 VISIT_VISITTIMEIN
         5. Position 53 VISIT_VISITTIMEOUT

6. Position 54 VISIT_VISITHOURS

Actual Visit information:

7. Position 60 EVV_VISITDATE
8. Position 61 EVV_CREATEDDATETIME
9. Position 63 EVV_CALLINTIME
10. Position 64 EVV_CALLOUTTIME
11. Position 65 EVV_ACTUALHOURS
12. Position 66 EVV_PAYHOURS (Bill Hours)
13. Position 108 EVV_LASTVISITMAINT (should be blank)
14. Position 114 EVV_AUTOCONFIRMFLAG

8.4. Auto-Verify – Automatic Downward Adjustment Option Enabled

Note: HHSC may waive this scenario if the PSO has indicated they do not wish to use this Optional Visit Maintenance Reduction option (Question 13 is No).

Demonstration Steps

1. **Data Setup in the EVV System:**
   a. Member
   b. Service Attendant
   c. Optional Automatic Downward Adjustment (a Visit Maintenance reduction option) is enabled in the EVV System.
   d. Optional Expanded Time for Auto-Verification (a Visit Maintenance reduction option) is also enabled in the EVV System.
   e. Scheduled visit for 8:00 AM to Noon (4 hours in duration).
   f. Due to the Call Matching Window policy the Service Attendant can clock in and clock out anytime between 12 a.m. - 11:59 p.m. on the date of service.
      i. Service Attendant clocks in and clocks out for a total duration of 4 hours and 22 minutes.
2. **System User demonstrates, and ORR Team verifies that:**
   a. The EVV system automatically downward adjusted bill hours to the 4-hour planned schedule instead of the rounded 4.25.
   b. The EVV system auto-verifies the visit transaction due to the enabling of the Expanded Time for Auto-Verification option and the Automatic Downward Adjustment options.
   c. The text file to be submitted to the EVV Aggregator contains the visit data for this scenario with bill hours as 4.0 and actual hours as 4.37. The PSO must present this text file to the ORR Team in the format the EVV system will use to transmit to the EVV Aggregator.
      i. All of the following fields should be highlighted:
         1. Position 34 INDVMBR_MEDICAID ID
         2. Position 18 EMPLOYEE_SOCSEC_ VISA_PASSPORT

Schedule information:

         3. Position 51 VISIT_VISITDATE
         4. Position 52 VISIT_VISITTIMEIN
         5. Position 53 VISIT_VISITTIMEOUT
         6. Position 54 VISIT_VISITHOURS

Actual Visit information:

7. Position 60 EVV_VISITDATE
8. Position 63 EVV_CALLINTIME
9. Position 64 EVV_CALLOUTTIME
10. Position 65 EVV_ACTUALHOURS
11. Position 66 EVV_PAYHOURS (Bill Hours)
12. Position 108 EVV_LASTVISITMAINT (should be blank)
13. Position 114 EVV_AUTOCONFIRMFLAG

9. SDV-20P

Business Rule

SDV-20P: EVV System must allow the System User to complete Visit Maintenance for a period of time specified in the HHSC EVV Policy Handbook. Visit Maintenance outside of the specified time period may be performed only after receiving payer approval.

9.1. Visit Maintenance – Within Allowed Timeframe (95 calendar days)

Demonstration Steps

1. **Data Setup in the EVV System:**
   a. Completed visit transaction in the EVV System with a duration (actual hours) of 3 hours and a date of service 94 days in the past (calculated as demonstration date minus 94 days)
2. **System User demonstrates, and ORR Team verifies:**
   a. The System User performs the following visit maintenance in the EVV System:
      i. Entry of two (2) bill hours (one (1) hour less than the actual hours)
      ii. Entry of the Reason Code 100 B with additional comments
   b. The EVV System accepts the changes to the visit transaction and accurately captures the following information:
      i. Bill hours is equal to two (2) hours
      ii. Reason Code 100 Service Variation and description B - *Downward adjustment of pay hour* and additional comments
      iii. Last Visit Maintenance date is equal to the demonstration date
   c. The text file the EVV system will submit to the EVV Aggregator contains the visit data for this scenario. The PSO must present this text file to the ORR Team in the format the EVV system will use to transmit to the EVV Aggregator.
      i. All of the following fields should be highlighted:
         1. Position 60 EVV_VISITDATE
         2. Position 61 EVV_CREATEDDATETIME
         3. Position 63 EVV_CALLINTIME
         4. Position 64 EVV_CALLOUTTIME
         5. Position 65 EVV_ACTUALHOURS
         6. Position 66 EVV_PAYHOURS (Bill Hours)
         7. Position 108 EVV_LASTVISITMAINT
      Note: If there is more than one reason code on the visit, highlight the reason code fields for this scenario.
         8. Position 76 EVV_REASONCODE1
         9. Position 77 EVV_REASONCODE1DESC
         10. Position 78 EVV_REASONCODE1COMMENT

9.2. Visit Maintenance – Outside Allowed Timeframe

Demonstration Steps

1. **Data Setup in the EVV System:**
   a. Completed visit transaction in the EVV System with:
      i. A date of service 96 days in the past (calculated as demonstration date minus 96 days).
      ii. Clock in and clock out for 3 actual hours in duration
2. **System User demonstrates, and ORR team validates that:**
   a. A System User attempts to perform the visit maintenance.
      i. Entry of two (2) bill hours (one (1) hour less than the actual hours)
   b. The EVV System does not allow visit maintenance to be performed on the visit due to the date of service being more than 95 days in the past.
   c. The EVV system presents a message to the System User instructing how to obtain Payer Approval.

9.3. Visit Maintenance – Outside Allowed Timeframe with Payer Approval

Demonstration Steps

1. **Data Setup in the EVV System:**
   a. Completed visit transaction in the EVV System with:
      i. A duration of 4 hours and
      ii. A date of service at least 96 days in the past
2. **System User demonstrates, and ORR Team verifies that:**
   a. A System User attempts to perform visit maintenance but is unable to do so because the date of service is outside the allowed visit maintenance timeframe.
   b. The PSO follows the procedure for requesting a Visit Maintenance unlock from the payer for that visit.
   c. See the Visit Maintenance Unlock Request Policy at this location: https://www.hhs.texas.gov/handbooks/electronic-visit-verification-policy-handbook/8000-visit-maintenanceThe PSO receives Payer approval to perform visit maintenance on that visit transaction
   d. EVV System is updated to reflect approval from the Payer and the visit is unlocked for Visit Maintenance.
   e. System User performs the following visit maintenance:
      i. Enters three (3) bill hours in the EVV System which is one (1) hour less than the actual hours (4) captured in the EVV System
      ii. Entry of Reason Code 100 Service Variation – B - *Downward adjustment of pay hours* and comments to explain the reason for using this Reason Code.
   f. The EVV System accepts the changes to the visit transaction.
   g. The EVV system accurately captured the following information:
      i. Payer approval to perform visit maintenance
      ii. Modified bill hours to three (3) hours
      iii. Reason Code 100 B and comments
      iv. Last Visit Maintenance date is equal to the demonstration date
   h. The text file to be submitted to the EVV Aggregator contains the visit data for this scenario. The PSO must present this text file to the ORR Team in the format the EVV system will use to transmit it to the EVV Aggregator.

       i.   All of the following fields should be highlighted:
1. Position 60 EVV_VISITDATE
2. Position 61 EVV_CREATEDDATETIME
3. Position 63 EVV_CALLINTIME
4. Position 64 EVV_CALLOUTTIME
5. Position 65 EVV_ACTUALHOURS
6. Position 66 EVV_PAYHOURS (Bill Hours)
7. Position 108 EVV_LASTVISITMAINT

Note: If there is more than one reason code on the visit, highlight the reason code fields for this scenario.

8. Position 76 EVV_REASONCODE1
9. Position 77 EVV_REASONCODE1DESC
10. Position 78 EVV_REASONCODE1COMMENT

10. SDV-21P

Business Rule

SDV-21P: EVV System must restrict the System User from performing Visit Maintenance on the following fields at a minimum:
- Actual service delivery date
- Actual service delivery clock in time
- Actual service delivery clock out time
- Actual hours worked
- Auto-populated data fields
- GPS coordinates

10.1. Visit Maintenance – Unable to Change Restricted Fields

Demonstration Steps

1. **Data Setup in the EVV System:**
   a. Previously accepted landline, alternative device or mobile method visit transaction in the EVV System with a date of service no more than 94 days in the past.
2. **System User demonstrates, and ORR team verifies that:**
   a. The PSO must present the previously accepted text file to the ORR Team in the format the EVV system will use to transmit it to the EVV Aggregator.
      i. All of the following fields should be highlighted:
         1. Position 60 EVV_VISITDATE
         2. Position 63 EVV_CALLINTIME
         3. Position 64 EVV_CALLOUTTIME
         4. Position 65 EVV_ACTUALHOURS
         5. Position 73 EVV_INPUTMETHOD_IN
         6. Position 74 EVV_INPUTMETHOD_OUT
         7. Position 62 EVV_PHONE
         8. Position 66 EVV_PAYHOURS (Bill Hours)
         9. Position 69 EVV_VISIT_LATITUDE_IN
         10. Position 70 EVV_VISIT_LONGITUDE_IN
         11. Position 116 EVV_VISIT_LATITUDE_OUT
         12. Position 117 EVV_VISIT_LONGITUDE_OUT
         13. Position 108 EVV_LASTVISITMAINT (may be blank)

   b. The System User opens the visit transaction for visit maintenance, but is unable to save changes to any of the following data elements:
      i. Actual service delivery date
      ii. Actual service delivery clock in time
      iii. Actual service delivery clock out time
      iv. Actual hours worked
      v. Call In method
      vi. Call out method

    vii. Phone number used to call in
   viii. GPS coordinates (when mobile method is used)
  c. The System User performs the following visit maintenance:
    i. Downward adjusts bill hours to one hour less than current value
    ii. Reason Code 100 B and comments
    iii. Last Visit Maintenance date is equal to the demonstration date
  d. The PSO must present the modified text file to the ORR Team in the format the EVV system will use to transmit it to the EVV Aggregator.
    i. All of the following fields should be highlighted:
     1. Position 60 EVV_VISITDATE
     2. Position 61 EVV_CREATEDDATETIME
     3. Position 63 EVV_CALLINTIME
     4. Position 64 EVV_CALLOUTTIME
     5. Position 65 EVV_ACTUALHOURS
     6. Position 73 EVV_INPUTMETHOD_IN
     7. Position 74 EVV_INPUTMETHOD_OUT
     8. Position 62 EVV_PHONE
     9. Position 66 EVV_PAYHOURS (Bill Hours)
     10. Position 69 EVV_VISIT_LATITUDE_IN
     11. Position 70 EVV_VISIT_LONGITUDE_IN
     12. Position 116 EVV_VISIT_LATITUDE_OUT
     13. Position 117 EVV_VISIT_LONGITUDE_OUT
     14. Position 108 EVV_LASTVISITMAINT

Note: If there is more than one reason code on the visit, highlight the reason code fields for this scenario.

     15. Position 76 EVV_REASONCODE1
     16. Position 77 EVV_REASONCODE1DESC
     17. Position 78 EVV_REASONCODE1COMMENT

11. SDV-46P

Business Rule

SDV-46P: EVV System must identify the input method as "GUI" when the clock in time for an EVV Visit Transaction is missing (missed clock in) and later manually entered.

11.1 Missed Clock In (GUI)

Demonstration Steps

2. **Data Setup in the EVV System:**
   a. Member Profile
   b. Service Attendant Profile
   c. Member must have a scheduled visit
   d. Service Attendant attempted to clock in using an EVV approved method, but the system did not register the clock in
   e. Service Attendant clocked out according to the schedule using the same approved method as the clock in attempt
   f. The EVV system records the visit as unverified requiring the System User to perform visit maintenance.
3. **System User demonstrates, and ORR Team verifies that:**
   a. A Service Attendant does not clock in due to technical issues.
   b. A System User manually creates the visit clock in in the EVV System based on verification of the visit with the Attendant or the member and updates the visit.
      i. Member information
      ii. Service Attendant information
      iii. Service information
      iv. Date of visit (must be within visit maintenance timeframe of 95 days)
      v. Bill hours
      vi. Type of method used to clock in (GUI)
      vii. Reason Code number 300 Technical Issues (F - Malfunctioning mobile device/application, A – Phone lines not working or B - Malfunctioning alternative device).
      viii. The EVV system requires Comments, and the System User must document the missing actual clock in date/time that was not electronically captured by the EVV system.
   c. The EVV System accepts the visit transaction.
   d. The EVV System has accurately captured the data the System User entered, and the ORR team has verified the following information:
      i. Appropriate Reason Code number 300 for the method used
      ii. Clock in date/time is entered in the Reason Code free text
      iii. GUI is displayed as the input method
      iv. Actual Clock in time is displayed as blank
      v. Actual Hours is displayed as zero
      vi. Bill Hours is displayed as the value entered by the System User

e. The text file the EVV system will submit to the EVV Aggregator contains the visit data for this scenario. The PSO must present this text file to the ORR Team in the format the EVV system will use to transmit it to the EVV Aggregator.
      i. All of the following fields should be highlighted:
         1. Position 60 EVV_VISITDATE
         2. Position 61 EVV_CREATEDDATETIME
         3. Position 63 EVV_CALLINTIME (this will be blank)
         4. Position 64 EVV_CALLOUTTIME
         5. Position 65 EVV_ACTUALHOURS (this will be zero)
         6. Position 66 EVV_PAYHOURS (Bill Hours)
         7. Position 73 EVV_INPUTMETHOD_IN
         8. Position 74 EVV_INPUTMETHOD_OUT
         9. Position 62 EVV_PHONE
         10. Position 108 EVV_LASTVISITMAINT

Note: If there is more than one reason code on the visit, highlight the reason code fields for this scenario.
         11. Position 76 EVV_REASONCODE1
         12. Position 77 EVV_REASONCODE1DESC
         13. Position 78 EVV_REASONCODE1COMMENT

12. SDV-47P

Business Rule

SDV-47P: EVV System must identify the input method as "GUI" when the clock out time for an EVV Visit Transaction is missing (missed clock out) and later manually entered.

12.1. Missed Clock Out (GUI)

Demonstration Steps

1. **Data Setup in the EVV System:**
   a. Member Profile
   b. Service Attendant Profile
   c. Scheduled visit
   d. Service Attendant clocked in according to the schedule using an approved EVV method
   e. Service Attendant failed to clock out
   f. The EVV system records the visit as unverified requiring the System User to perform visit maintenance.
2. **System User demonstrates, and ORR Team verifies:**
   a. A System User manually creates the visit clock out in the EVV System based on verification of the visit with the Attendant.
      i. Member information
      ii. Service Attendant information
      iii. Service

        iv. Date of visit (must be within visit maintenance timeframe of 95 days)

        v. Bill hours

b. System User enters Reason Code number 300Technical Issues (F - Malfunctioning mobile device/application, A – Phone lines not working or B - Malfunctioning alternative device).

c.

        i. The EVV system requires Comments, and the System User must document the missing clock out time that was not electronically captured by the EVV system.

d. The EVV System accepts the visit transaction.

e. The EVV System has accurately captured, and the ORR team has verified the following information:

        i. Appropriate Reason Code number 300 for the method used

        ii. Clock out date/time is entered in the Reason Code free text

        iii. 'GUI' is displayed as the input method

        iv. Actual Clock out time is displayed as blank

        v. Actual Hours is displayed as zero

f. Bill Hours is displayed as the value entered by the System User. The text file the EVV system will submit to the EVV Aggregator contains the visit data for this scenario. The PSO must present this text file to the ORR Team in the format the EVV system will use to transmit to the EVV Aggregator.

        i. All of the following fields should be highlighted:

            1. Position 60 EVV_VISITDATE

            2. Position 61 EVV_CREATEDDATETIME

            3. Position 63 EVV_CALLINTIME (this will be blank)

            4. Position 64 EVV_CALLOUTTIME

            5. Position 65 EVV_ACTUALHOURS

            6. Position 66 EVV_PAYHOURS (Bill Hours)

            7. Position 73 EVV_INPUTMETHOD_IN

            8. Position 74 EVV_INPUTMETHOD_OUT

            9. Position 62 EVV_PHONE

            10. Position 108 EVV_LASTVISITMAINT

Note: If there is more than one reason code on the visit, highlight the reason code fields for this scenario.

            11. Position 76 EVV_REASONCODE1

            12. Position 77 EVV_REASONCODE1DESC

            13. Position 78 EVV_REASONCODE1COMMENT

13. SDV-56P

Business Rule

SDV-56P: EVV System must update the last visit maintenance date in the EVV Visit Transaction to the current date, whenever a change to one or more fields identified as impacting the last visit maintenance date in the HHSC EVV Policy Handbook are saved to the EVV Visit Transaction after the System User/Service Attendant has documented the visit.

The PSO must demonstrate each scenario separately (no other changes will be made to the visit transaction, except to enter a Reason Code number and description) to verify that changing that specific field caused the visit maintenance date to change.

13.1. Visit Maintenance Date – NPI Updated

Note: HHSC may waive this scenario if the EVV System prevents updates to the NPI during Visit Maintenance.

Demonstration Steps

1. **Data Setup in the EVV System:**
   a. Visit transactions previously submitted (accepted or rejected) by the Data Aggregator. If rejected, rejection will be because the NPI was incorrect.
2. **System User demonstrates, and ORR Team verifies:**
   a. The following visit maintenance actions:
      i. An update to the visit transaction field: NPI (labeled PROVIDER_NPI on the visit transaction record for the EVV Aggregator)
   b. EVV System accepts the changes to the visit transaction.
   c. Last Visit maintenance date matches the current date (the date of demonstration)
   d. The text file the EVV system will submit to the EVV Aggregator contains the visit data for each scenario in #13 with the Last Visit Maintenance Date updated with the date of the demonstration. The PSO must present this text file to the ORR Team in the format the EVV system will use to transmit to the EVV Aggregator.
      i. The following fields should be highlighted:
         1. Position 2 PROVIDER_NPI
         2. Position 60 EVV_VISITDATE
         3. Position 108 EVV_LASTVISITMAINT

13.2. Visit Maintenance Date – API Updated

Note: HHSC may waive this scenario if the EVV System prevents updates to the API during Visit Maintenance.

Demonstration Steps

1. **Data Setup in the EVV System:**

2. Visit transactions previously submitted (accepted or rejected) by the Data Aggregator. If rejected, rejection will be because the API was incorrect. **System User demonstrates, and ORR Team verifies:**
   a. The following visit maintenance actions:
      i. An update to the visit transaction field API (labeled PROVIDER_API on the visit transaction for the EVV Aggregator)
   b. EVV System accepts the changes to the visit transaction.
   c. Last Visit maintenance date matches the current date (the date of demonstration)
   d. The text file to be submitted to the EVV Aggregator contains the visit data for each scenario in #13 with the Last Visit Maintenance Date updated with the date of the demonstration. The PSO must present this text file to the ORR Team in the format the EVV system will use to transmit it to the EVV Aggregator.
      i. The following fields should be highlighted:
         1. Position 3 PROVIDER_API
         2. Position 60 EVV_VISITDATE
         3. Position 108 EVV_LASTVISITMAINT

13.3. Visit Maintenance Date – Contract Number Updated

Note: HHSC may waive this scenario if the EVV System prevents updates to the Contract Number during Visit Maintenance.

Demonstration Steps

1. **Data Setup in the EVV System:**
   a. Visit transactions previously submitted (accepted or rejected) by the Data Aggregator, If rejected, rejection will be because the contract number was incorrect.
2. **System User demonstrates, and ORR Team verifies:**
   a. The following visit maintenance actions:
      i. An update to the visit transaction field Contract Number (labeled PROVIDER_CONTRACTNUMBER on the visit transaction for the EVV Aggregator)
   b. EVV System accepts the changes to the visit transaction.
   c. Last Visit maintenance date matches the current date (the date the demonstration was performed)
   d. The text file to be submitted to the EVV Aggregator contains the visit data for each scenario in #13 with the Last Visit Maintenance Date updated with the date of the demonstration. The PSO must present this text file to the ORR Team in the format the EVV system will use to transmit it to the EVV Aggregator.
      i. The following fields should be highlighted:
         1. Position 7 PROVIDER_CONTRACTNUMBER
         2. Position 60 EVV_VISITDATE
         3. Position 108 EVV_LASTVISITMAINT

13.4. Visit Maintenance Date – Medicaid Id Updated

Note: HHSC may waive this scenario if the EVV System prevents updates to the Medicaid Id during Visit Maintenance.

Demonstration Steps

1. **Data Setup in the EVV System:**
   a. Visit transactions previously submitted (accepted or rejected) by the Data Aggregator
2. **System User demonstrates, and ORR Team verifies:**
   a. The following visit maintenance actions:
      i. An update to the visit transaction field Medicaid Id (labeled INDVMBR_MEDICAIDID on the visit transaction for the EVV Aggregator)
   b. EVV System accepts the changes to the visit transaction.
   c. Last Visit maintenance date matches the current date (the date the demonstration was performed)
   d. The text file to be submitted to the EVV Aggregator contains the visit data for each scenario in #13 with the Last Visit Maintenance Date updated with the date of the demonstration. The PSO must present this text file to the ORR Team in the format the EVV system will use to transmit it to the EVV Aggregator.
      i. The following fields should be highlighted:
         1. Position 34 INDVMBR_MEDICAIDID
         2. Position 60 EVV_VISITDATE
         3. Position 108 EVV_LASTVISITMAINT

13.5. Visit Maintenance Date – Service Group Updated

Note: HHSC may waive this scenario if the EVV System prevents updates to the Long-Term Care (LTC) Service Group field during Visit Maintenance or does not deliver LTC services.

Demonstration Steps

1. **Data Setup in the EVV System:**
   a. Visit transactions previously submitted (accepted or rejected) by the Data Aggregator
2. **System User demonstrates, and ORR Team verifies:**
   a. The following visit maintenance actions:
      i. An update to the visit transaction field Contract Number (Service Group (labeled VISIT_SVCGRP on the visit transaction for the EVV Aggregator)
      ii. Entry of one or more Reason Code number and description, with or without additional comments
   b. EVV System accepts the changes to the visit transaction.
   c. Last Visit maintenance date matches the current date (the date the demonstration was performed)

d. The text file to be submitted to the EVV Aggregator contains the visit data for each scenario in #13 with the Last Visit Maintenance Date updated with the date of the demonstration. The PSO must present this text file to the ORR Team in the format the EVV system will use to transmit it to the EVV Aggregator.
  i. The following fields should be highlighted:
    1. Position 56 VISIT_SVCGRP
    2. Position 60 EVV_VISITDATE
    3. Position 108 EVV_LASTVISITMAINT

Note: If there is more than one reason code on the visit, highlight the reason code fields for this scenario.
    4. Position 76 EVV_REASONCODE1
    5. Position 77 EVV_REASONCODE1DESC
    6. Position 78 EVV_REASONCODE1COMMENT

13.6. Visit Maintenance Date – Service Code Updated

Note: HHSC may waive this scenario if the EVV System prevents updates to the Long-Term Care (LTC) Service Code field during Visit Maintenance or does not deliver LTC services.

Demonstration Steps

1. **Data Setup in the EVV System:**
   a. Visit transactions previously submitted (accepted or rejected) by the Data Aggregator
2. **System User demonstrates, and ORR Team verifies:**
   a. The following visit maintenance actions:
     i. An update to the visit transaction field Service Code (labeled EVV_SVCCODE on the visit transaction for the EVV Aggregator)
     ii. Entry of one or more Reason Code number and description, with or without additional comments
   b. EVV System accepts the changes to the visit transaction.
   c. Last Visit maintenance date matches the current date (the date the demonstration was performed)
   d. The text file the EVV system will submit to the EVV Aggregator contains the visit data for each scenario in #13 with the Last Visit Maintenance Date updated with the date of the demonstration. The PSO must present this text file to the ORR Team in the format the EVV system will use to transmit it to the EVV Aggregator.
     i. The following fields should be highlighted:
       1. Position 57 EVV_SVCCODE
       2. Position 60 EVV_VISITDATE
       3. Position 108 EVV_LASTVISITMAINT

Note: If there is more than one reason code on the visit, highlight the reason code fields for this scenario.
       4. Position 76 EVV_REASONCODE1
       5. Position 77 EVV_REASONCODE1DESC

6. Position 78 EVV_REASONCODE1COMMENT

13.7. Visit Maintenance Date – HCPCS Code Updated

Note: HHSC may waive this scenario if the EVV System prevents updates to the HCPCS code during Visit Maintenance.

Demonstration Steps

1. **Data Setup in the EVV System:**
   a. Visit transactions previously submitted (accepted or rejected) by the Data Aggregator
2. **System User demonstrates, and ORR Team verifies:**
   a. The following visit maintenance actions:
      i. An update to the visit transaction field HCPCS Code (labeled EVV_HCPCS_CODE on the visit transaction for the EVV Aggregator)
      ii. Entry of one or more Reason Code number and description, with or without additional comments
   b. EVV System accepts the changes to the visit transaction.
   c. Last Visit maintenance date matches the current date (the date the demonstration was performed)
   d. The text file to be submitted to the EVV Aggregator contains the visit data for each scenario in #13 with the Last Visit Maintenance Date updated with the date of the demonstration. The PSO must present this text file to the ORR Team in the format the EVV system will use to transmit it to the EVV Aggregator.
      i. The following fields should be highlighted:
         1. Position 58 EVV_HCPCS_CODE
         2. Position 60 EVV_VISITDATE
         3. Position 108 EVV_LASTVISITMAINT
      Note: If there is more than one reason code on the visit, highlight the reason code fields for this scenario.
         4. Position 76 EVV_REASONCODE1
         5. Position 77 EVV_REASONCODE1DESC
         6. Position 78 EVV_REASONCODE1COMMENT

13.8. Visit Maintenance Date – HCPCS Modifier Updated

Note: HHSC may waive this scenario if the EVV System prevents updates to the HCPCS Modifier code during Visit Maintenance.

Demonstration Steps

1. **Data Setup in the EVV System:**
   a. Visit transactions previously submitted (accepted or rejected) by the Data Aggregator
2. **System User demonstrates, and ORR Team verifies:**

    a. The following visit maintenance actions:
        i. An update to the visit transaction field HCPCS Modifier (labeled EVV_MODIFIER on the visit transaction for the EVV Aggregator)
        ii. Entry of one or more Reason Code number and description, with or without additional comments
    b. EVV System accepts the changes to the visit transaction.
    c. Last Visit maintenance date matches the current date (the date the demonstration was performed)
    d. The text file to be submitted to the EVV Aggregator contains the visit data for each scenario in #13 with the Last Visit Maintenance Date updated with the date of the demonstration. The PSO must present this text file to the ORR Team in the format the EVV system will use to transmit it to the EVV Aggregator.
        i. The following fields should be highlighted:
            1. Position 59 EVV_MODIFIER
            2. Position 60 EVV_VISITDATE
            3. Position 108 EVV_LASTVISITMAINT

Note: If there is more than one reason code on the visit, highlight the reason code fields for this scenario.

            4. Position 76 EVV_REASONCODE1
            5. Position 77 EVV_REASONCODE1DESC
            6. Position 78 EVV_REASONCODE1COMMENT

13.9. Visit Maintenance Date – Bill Hours Updated

Demonstration Steps

1. **Data Setup in the EVV System:**
    a. Visit transactions previously accepted by the Data Aggregator
2. **System User demonstrates, and ORR Team verifies:**
    a. The following visit maintenance actions:
        i. An update to the visit transaction field Bill Hours (labeled EVV_PAYHOURS on the visit transaction for the EVV Aggregator)
        ii. Entry of one or more Reason Code number and description, with or without additional comments
    b. EVV System accepts the changes to the visit transaction.
    c. Last Visit maintenance date matches the current date (the date the demonstration was performed)
    d. The text file to be submitted to the EVV Aggregator contains the visit data for each scenario in #13 with the Last Visit Maintenance Date updated with the date of the demonstration. The PSO must present this text file to the ORR Team in the format the EVV system will use to transmit it to the EVV Aggregator.
        i. The following fields should be highlighted:
            1. Position 65 EVV_ACTUALHOURS
            2. Position 66 EVV_PAYHOURS (Bill hours)

3. Position 60 EVV_VISITDATE
4. Position 108 EVV_LASTVISITMAINT

Note: If there is more than one reason code on the visit, highlight the reason code fields for this scenario.

5. Position 76 EVV_REASONCODE1
6. Position 77 EVV_REASONCODE1DESC
7. Position 78 EVV_REASONCODE1COMMENT

13.10. Visit Maintenance Date – Number of Units Updated

Demonstration Steps

1. **Data Setup in the EVV System:**
   a. Visit transactions that have been previously accepted by the Data Aggregator
2. **System User demonstrates, and ORR Team verifies:**
   a. The following visit maintenance actions:
       i. An update to the visit transaction field Number of Units (labeled EVV_UNITS on the visit transaction for the EVV Aggregator)
       ii. Entry of one or more Reason Code number and description, with or without additional comments
   b. EVV System accepts the changes to the visit transaction.
   c. Last Visit maintenance date matches the current date (the date of the demonstration)
   d. The text file to be submitted to the EVV Aggregator contains the visit data for each scenario in #13 with the Last Visit Maintenance Date updated with the date of the demonstration. The PSO must present this text file to the ORR Team in the format the EVV system will use to transmit it to the EVV Aggregator.
       i. The following fields should be highlighted:
           1. Position 66 EVV_PAYHOURS (Bill hours)
           2. Position 67 EVV_UNITS
           3. Position 60 EVV_VISITDATE
           4. Position 108 EVV_LASTVISITMAINT
   Note: If there is more than one reason code on the visit, highlight the reason code fields for this scenario.
           5. Position 76 EVV_REASONCODE1
           6. Position 77 EVV_REASONCODE1DESC
           7. Position 78 EVV_REASONCODE1COMMENT

13.11. Visit Maintenance Date – Reason Code Only

Demonstration Steps

1. **Data Setup in the EVV System:**
   a. Visit transaction <u>transmitted</u> to the Data Aggregator
   b. <u>Visit maintenance date</u> on the visit transaction is prior to the current date
2. **System User demonstrates, and ORR Team verifies:**
   a. The following visit maintenance:
       i. Enters one Reason Code number and description, with or without additional comments
       ii. No other changes made to the visit transaction
       iii. EVV System accepts the changes to the visit transaction.
   b. The following information has been captured accurately in the EVV System:
       i. One Reason Code number and description (entered in step #2), with or without additional comments

      ii. Visit maintenance date matches the current date (the date steps 2 and 3 were performed)

c. The text file to be submitted to the EVV Aggregator containing the visit data for each scenario in #13 to confirm that the Last Visit Maintenance Date has been updated with the current date. The PSO must present this text file to the ORR Team in the format as it will be transmitted to the EVV Aggregator.

      i.   The following fields should be highlighted:

1. Position 60 EVV_VISITDATE
2. Position 108 EVV_LASTVISITMAINT

Note: If there is more than one reason code on the visit, highlight the reason code fields for this scenario.

3. Position 76 EVV_REASONCODE1
4. Position 77 EVV_REASONCODE1DESC
5. Position 78 EVV_REASONCODE1COMMENT

13.12. Visit Maintenance Date – No Visit Maintenance Fields Updated

<u>Demonstration Steps</u>

1. **Data Setup in the EVV System:**
   a. Visit transaction <u>transmitted</u> to the Data Aggregator
   b. <u>No visit maintenance date</u> on the visit transaction
2. **System User demonstrates, and ORR Team verifies:**
   a. The following Visit Maintenance:
      i. User updates one or more fields on the visit transaction, none of which are the fields that cause the visit maintenance date to change (identified in demonstrations 13.1 through 13.11 above)
      ii. User makes no other changes to the visit transaction
      iii. EVV System accepts the changes to the visit transaction.
   b. That the EVV system has accurately captured the following information:
      i. The EVV system saved changes made to the field(s) updated in step 2a
      ii. The EVV system did not change the visit maintenance date to the current date (the date steps 2.a were performed)
   c. The text file the EVV system will submit to the EVV Aggregator containing the visit data for each scenario in #13 to confirm that the EVV system did not update the Last Visit Maintenance Date. The PSO must present this text file to the ORR Team in the format the EVV system will transmit it to the EVV Aggregator.
      i. The following fields should be highlighted:
      Fields modified in step 2.a.i
         1. Position 60 EVV_VISITDATE
         2. Position 108 EVV_LASTVISITMAINT

14. SDV-53P

Business Rule

SDV-53P: EVV System must use bill time in and bill time out, when entered, to calculate billed hours in the same manner as actual service delivery time is calculated.

14.1. Enter Bill Time to Calculate Bill Hours

Demonstration Steps

1. **Data Setup in the EVV System:**
   a. Member
   b. Service Attendant
   c. Scheduled visit with a duration of 3 hours
   d. Service Attendant clocked in with an approved EVV method
   e. Service Attendant clocks out one hour longer than the scheduled duration (4 hours) with an approved EVV method
2. **System User demonstrates, and ORR team verifies**:
   a. The calculation of the bill hours in the EVV System whereby the System User:
      i. Enters the clock in time into the bill time in field
      ii. Enters the correct clock out into the bill time out field
      iii. Enters the calculated value into the bill hours (unless the EVV System has pre-populated the field for the System User)
      iv. Enters one or more Reason Code numbers and description
      v. Enters a comment to document the time in and time out
   b. The EVV System accepts the changes to the visit transaction.
   c. The EVV system accurately captures the following information:
      i. Bill time in and bill time out
      ii. Rounded bill hours (based on the bill times entered) per HHSC EVV Policy see section 8090 Rounding Rules in the HHSC EVV Policy Handbook: https://www.hhs.texas.gov/handbooks/electronic-visit-verification-policy-handbook/8000-visit-maintenance
      iii. One or more Reason Code number and description, with a comment to document the bill time out (this satisfies the demonstration requirement for SDV-48P)
      iv. Last Visit maintenance date matches the current date
   d. The text file to be submitted to the EVV Aggregator to confirm that the bill time in and bill time out values are not included in the record and bill hours is the calculated value from bill time in and bill time out. The PSO must present this text file to the ORR Team in the format the EVV system will use to transmit it to the EVV Aggregator. Note: the Bill time in and Bill time out fields are NOT transmitted to the EVV Aggregator so they will not appear in the EVV Visit Transaction.
      i. The following fields should be highlighted:
         1. Position 60 EVV_VISITDATE
         2. Position 63 EVV_CALLINTIME (this are not modified)
         3. Position 64 EVV_CALLOUTTIME (this are not modified)

4. Position 65 EVV_ACTUALHOURS (this are not modified)
5. Position 66 EVV_PAYHOURS (Bill Hours)
6. Position 67 EVV_UNITS
7. Position 108 EVV_LASTVISITMAINT

Note: If there is more than one reason code on the visit, highlight the reason code fields for this scenario.

8. Position 76 EVV_REASONCODE1
9. Position 77 EVV_REASONCODE1DESC
10. Position 78 EVV_REASONCODE1COMMENT

15. VSS-5P

Business Rule

VSS-5P: EVV System must provide read-only access to HHSC and MCO staff to view the same information that the System User can access and view. MCO access must be limited to view only the data of their Members.

15.1 HHSC Read-Only Access

Demonstration Steps:

15.1.1 HHSC Read-Only Access – PSO Business Unit Profiles

1. **Data Setup in the EVV System:**
   a. System Administrator creates an account as an HHSC user
2. **System User demonstrates, and ORR Team validates that:**
   a. System Administrator logs into the EVV System as an HHSC user
   b. The HHSC user has read-only access in the EVV System to view all PSO business unit profiles.

15.1.2 HHSC Read-Only Access – Member Profiles

1. **Data Setup in the EVV System:**
   a. System Administrator creates an account as an HHSC user
2. **System User demonstrates, and ORR Team validates that:**
   a. System Administrator logs into the EVV System as an HHSC user
   b. The HHSC user has read-only access in the EVV System to view all Member profiles.

15.1.3 HHSC Read-Only Access – Service Attendant Profiles

1. **Data Setup in the EVV System:**
   a. System Administrator creates an account as an HHSC user
2. **System User demonstrates, and ORR Team validates that:**
   a. System Administrator logs into the EVV System as an HHSC user
   b. The HHSC user has read-only access in the EVV System to view all Service Attendant profiles.

15.1.4 HHSC Read-Only Access – Schedules

1. **Data Setup in the EVV System:**
   a. System Administrator creates an account as an HHSC user
2. **System User demonstrates, and ORR Team validates that:**
   a. System Administrator logs into the EVV System as an HHSC user
   b. The HHSC user has read-only access in the EVV System to view all schedules.

15.1.5 HHSC Read-Only Access – Authorizations

1. **Data Setup in the EVV System:**
   a. System Administrator creates an account as an HHSC user
2. **System User demonstrates, and ORR Team validates that:**
   a. System Administrator logs into the EVV System as an HHSC user
   b. The HHSC user has read-only access in the EVV System to view all authorizations.

15.1.6 HHSC Read-Only Access – Visit Transactions

1. **Data Setup in the EVV System:**
   a. System Administrator creates an account as an HHSC user
2. **System User demonstrates, and ORR Team validates that:**
   a. System Administrator logs into the EVV System as an HHSC user
   b. The HHSC user has read-only access in the EVV System to view all visit transactions.

15.1.7 HHSC Read-Only Access – Standard System Reports

The Service Delivery Exception Report must be generated by **all** Proprietary Systems. HHSC may waive standard reports according to the PS Detailed Questionnaire responses listed below:

Question 4 has FMSA, or Both checked, indicating the CDS business rules apply and the following reports:
- EVV System must request these CDS Employer reports from the EVV Aggregator web service:
  o EVV Attendant History Report
  o EVV CDS Employer Usage Report (for reviews after May 2022)
  o EVV Clock In/Clock Out Usage Report
  o EVV Reason Code Usage and Free Text Report
  o EVV Units of Service Summary Report
- EVV System must create this CDS Employer report using data stored within the system:
  o EVV CDS Service Delivery Log

Question 21 is Yes, the PSO will be using a Landline Electronic Visit Verification Method.
- EVV System must create this report within the EVV Proprietary System:
  o EVV Landline Phone Verification Report

Question 9 is Yes, Service Attendants or CDS employees deliver non-EVV services.
- EVV System must create this report within the EVV Proprietary System:
  o Non-EVV Relevant Time Logged

15.2. MCO Read-Only Access

15.2.1 MCO Read-Only Access – PSO Business Unit Profiles

Note: For PSO business unit profiles, the EVV system must limit access to the business units for which the MCO is the payer and further limit access to only the dates of service when the MCO was the payer for that business unit.

Demonstration Steps

1. **Data Setup in the EVV System:**
   a. System Administrator creates two accounts in the EVV System for two MCO users:
      i. MCO User 1 associated with an MCO who has a contract with the PSO business unit.
      ii. MCO User 2 associated with an MCO who does not have a contract with the PSO business unit.
2. **System User demonstrates, and ORR Team validates that:**
   a. MCO System User 1 (whose organization has a contract with the PSO business unit) logs into the EVV System. .
   b. MCO System User 1 can view the PSO business unit profile(s) that is associated with the MCO.
   c. MCO System User 2 (whose organization does not have a contract with the PSO business unit) logs into the EVV System.
   d. MCO System User 2 cannot view the PSO business unit profile.

15.2.2 MCO Read-Only Access – Member Profiles

Note: The EVV system must limit access to the Member profile for the dates when an MCO was the payer. If a Member changes MCO payers, the EVV system must limit the previous and new MCO to viewing data only for the dates for when the individual was a member.

Demonstration Steps

1. **Data Setup in the EVV System:**
   a. Two Members:
      i. Member 1 is a Medicaid individual enrolled with two different MCOs at different periods of time.
      ii. Member 2 is a Medicaid individual who is not enrolled in managed care and receives all services through Fee for Service (HHSC or LTC).
   b. Two system user accounts for two different MCOs (both have a contract with the PSO business unit):
      i. MCO 1 is associated with Member 1 during one date range of the year.
      ii. MCO 2 is associated with Member 1 during a different date range in the year.
2. **System User demonstrates, and ORR Team validates that:**
   a. MCO 1 System User logs into the EVV System.
      i. MCO 1 System User can only view (not edit) the Member profile for dates of service when the individual was their Member.

ii. MCO 1 System User cannot view the Member profile for dates of service when the individual was not their Member.

iii. MCO 1 System User cannot view the individual who is not enrolled in Managed Care.

b. MCO 2 System User logs into the EVV System.

i. MCO 2 System User can only view (not edit) the Member profile for dates of service when the individual was their Member.

ii. MCO 2 System User cannot view the Member profile for dates of service when the individual was not their Member.

iii. MCO 2 System User cannot view the individual who is not enrolled in Managed Care.

15.2.3 MCO Read-Only Access – Service Attendant Profiles

Note: The MCO System User has read-only access in the EVV System to view only Service Attendant profiles for individuals who are associated with a Member of the System User's MCO.

Demonstration Steps

1. **Data Setup in the EVV System:**
   a. Two Members:
      i. Member 1 is a Medicaid individual enrolled with two different MCOs at different periods of time.
      ii. Member 2 is a Medicaid individual who is not enrolled in managed care and receives all services through Fee for Service (HHSC or LTC).
   b. Two system user accounts for two different MCOs (both have a contract with the PSO business unit):
      i. MCO 1 is associated with Member 1 during one date range of the year.
      ii. MCO 2 is associated with Member 1 during a different date range in the year.
2. **System User demonstrates, and ORR Team validates that:**
   a. MCO 1 System User logs into the EVV System.
      i. MCO 1 System User can only view (not edit) the Member profile for dates of service when the individual was their Member.
      ii. MCO 1 System User cannot view the Member profile for dates of service when the individual was not their Member.
      iii. MCO 1 System User cannot view the Member profile for the individual not enrolled in Managed Care.
   b. MCO 2 System User logs into the EVV System.
      i. MCO 2 System User can only view (not edit) the Member profile for dates of service when the individual was their Member.
      ii. MCO 2 System User cannot view the Member profile for dates of service when the individual was not their Member.
      iii. MCO 2 System User cannot view the Member profile for the individual not enrolled in Managed Care.

15.2.4 MCO Read-Only Access – Schedules

Note: The MCO System User has read-only access in the EVV System to view schedules for the dates of service when the individual is a member of the MCO.

Demonstration Steps

1. **Data Setup in the EVV System:**
   a. Two Members:
      i. Member 1 is a Medicaid individual enrolled with two different MCOs at different periods of time.
      ii. Member 2 is a Medicaid individual who is not enrolled in managed care and receives all services through Fee for Service (HHSC or LTC).
   b. Two system user accounts for two different MCOs (both have a contract with the PSO business unit):
      i. MCO 1 is associated with Member 1 during one date range of the year.
      ii. MCO 2 is associated with Member 1 during a different date range in the year.
2. **System User demonstrates, and ORR Team validates that:**
   a. MCO 1 System User logs into the EVV System.
      i. MCO 1 System User can only view (not edit) schedules for dates of service when the individual was their Member.
      ii. MCO 1 System User cannot view schedules for dates of service when the individual was not their Member.
      iii. MCO 1 System User cannot view the schedules for the Member who is not enrolled in Managed Care.
   b. MCO 2 System User logs into the EVV System.
      i. MCO 2 System User can only view (not edit) schedules for dates of service when the individual was their Member.
      ii. MCO 2 System User cannot view schedules for dates of service when the individual was not their Member.
      iii. MCO 2 System User cannot view the schedules for the Member who is not enrolled in Managed Care.

15.2.5 MCO Read-Only Access – Authorizations

Note: The MCO System User has read-only access in the EVV System to view authorizations for the dates of service when the individual is a member of the MCO.

Demonstration Steps

1. **Data Setup in the EVV System:**
   a. Two Members:
      i. Member 1 is a Medicaid individual enrolled with two different MCOs at different periods of time.
      ii. Member 2 is a Medicaid individual who is not enrolled in managed care and receives all services through Fee for Service (HHSC or LTC).

      b. Two system user accounts for two different MCOs (both have a contract with the PSO business unit):

         i. MCO 1 is associated with Member 1 during one date range of the year.

        ii. MCO 2 is associated with Member 1 during a different date range in the year.

2. **System User demonstrates, and ORR Team validates that:**

      a. MCO 1 System User logs into the EVV System.

         i. MCO 1 System User can only view (not edit) authorizations for dates of service when the individual was their Member.

        ii. MCO 1 System User cannot view authorizations for dates of service when the individual was not their Member.

        iii. MCO 1 System User cannot view the authorizations for the individual not enrolled in Managed Care.

      b. MCO 2 System User logs into the EVV System.

         i. MCO 2 System User can only view (not edit) authorizations for dates of service when the individual was their Member.

        ii. MCO 2 System User cannot view authorizations for dates of service when the individual was not their Member.

        iii. MCO 2 System User cannot view the authorizations for the individual not enrolled in Managed Care.

15.2.6 MCO Read-Only Access – Visit Transactions

Note: The MCO System User has read-only access in the EVV System to view visit transactions for the dates of service when the individual is a member of the MCO.

Demonstration Steps

1. **Data Setup in the EVV System:**

      a. Two Members:

         i. Member 1 is a Medicaid individual enrolled with two different MCOs at different periods of time.

        ii. Member 2 is a Medicaid individual who is not enrolled in managed care and receives all services through Fee for Service (HHSC or LTC).

      b. Two system user accounts for two different MCOs (both have a contract with the PSO business unit):

         i. MCO 1 is associated with Member 1 during one date range of the year.

        ii. MCO 2 is associated with Member 1 during a different date range in the year.

2. **System User demonstrates, and ORR Team validates that:**

      a. MCO 1 System User logs into the EVV System.

         i. MCO 1 System User can only view (not edit) visit transactions for dates of service when the individual was their Member.

        ii. MCO 1 System User cannot not view visit transactions for dates of service when the individual was not their Member.

        iii. MCO 1 System User cannot view the visit transactions for the individual not enrolled in Managed Care.

      b. MCO 2 System User logs into the EVV System.

        i. MCO 2 System User can only view (not edit) visit transactions for dates of service when the individual was their Member.

       ii. MCO 2 System User cannot view visit transactions for dates of service when the individual was not their Member.

     iii. MCO 2 System User cannot view the visit transactions for the individual not enrolled in Managed Care.

15.2.7 MCO Read-Only Access – Standard System Reports

Note: The MCO System User has read-only access in the EVV System to view standard system reports, however, the reports must only include data associated with the dates of service for which the individual is a member of the MCO.

All Proprietary Systems must generate the Service Delivery Exception Report. HHSC may waive standard reports according to the PSO Detailed Questionnaire responses listed below:

Question 4 has FMSA, or Both checked, indicating the CDS business rules apply and the following reports:
- EVV System must request these CDS Employer reports from the EVV Aggregator web service:
  - EVV Attendant History Report
  - EVV Clock In/Clock Out Usage Report
  - EVV Reason Code Usage and Free Text Report
  - EVV Units of Service Summary Report
- EVV System must create this report CDS Employer report using data stored within the system:
  - EVV CDS Service Delivery Log

Question 21 is Yes, the PSO will be using a Landline Electronic Visit Verification Method.
- EVV System must create this report within the EVV Proprietary System:
  - EVV Landline Phone Verification Report

Question 9 is Yes, Service Attendants or CDS employees deliver non-EVV services.
- EVV System must create this report within the EVV Proprietary System:
  - Non-EVV Relevant Time Logged

Demonstration Steps

1. **Data Setup in the EVV System:**
   a. One HHSC user account for demonstration comparisons.
   b. Two MCO user accounts for which the PSO business unit has an association.
      i. MCO 1 has an individual as a member during a date range;
      ii. MCO 2 has the same individual as a member during a different date range (the individual changed MCOs).
   c. Multiple Managed Care Members enrolled with the two different MCOs at different periods of time with associated data relevant to the reports.
2. **System User demonstrates, and ORR Team validates that:**

    a. HHSC System user logs into the EVV System.
   - i. HHSC System user generates the EVV Service Delivery Exception Report for a date range of 3 months.
   - ii. All data for all users for that date range are included in the counts.
   - iii. Report is kept available for comparison purposes in the next steps.

    b. MCO 1 System User logs into the EVV System.
   - i. MCO 1 System User generates the EVV Service Delivery Exception Report for the same date range as the HHSC System User. The total counts of visits should be different from what was viewed by the HHSC System User.
   - ii. MCO 1 System User views all other applicable standard system reports with data for whom the individual is their Member.
   - iii. MCO 1 System User cannot view applicable standard system reports with data for whom the individual is not their Member.

    c. MCO 2 System User logs into the EVV System.
   - i. MCO 2 System User generates the EVV Service Delivery Exception Report for the same date range as the HHSC System User. The total counts of visits should be different from what was viewed by the HHSC System User and the MCO 1 System User.
   - ii. MCO 2 System User views all other applicable standard system reports with data for whom the individual is their Member.
   - iii. MCO 2 System User cannot view applicable standard system reports with data for whom the individual is not their Member.

16. SDV-9P

<u>Business Rule</u>

SDV-9P: EVV System must support overnight shifts.

16.1. Mobile Method – Overnight Visit with Schedules

<u>Note: HHSC may waive this scenario if the PSO is not using Mobile Method (Question 24 is No) or using Mobile Method but not using schedules (Question 11 is No).</u>

<u>Demonstration Steps</u>
1. **Data Setup in the EVV System:**
    a. Member with a mobile method registered in the EVV System
    b. Service Attendant
    c. Scheduled overnight visit (starts 11:00 PM, ends 6:00 AM the next day)
2. **System User demonstrates, and ORR Team verifies that**:
    a. A Service Attendant clocks in according to the schedule using the mobile method.
    b. A Service Attendant clocks out according to the schedule using the mobile method.
    c. The EVV system has accurately captured the following information (per SDV-1P):
        i. Member receiving the service
        ii. Service Attendant providing the service
        iii. Proprietary System Operator Business Unit the Service Attendant is performing the service on behalf of
        iv. Location where the service is delivered (home or community location, and correct GPS coordinates)
        v. Dates the service is performed overnight
        vi. Time the service is performed (clock in and clock out time)
        vii. Type of service performed (HCPCS/Modifiers and Service Group/Service Code, if applicable)
    d. The EVV system has accurately captured the type of method used (Mobile Method).
    e. The text file to be submitted to the EVV Aggregator contains two visit records, one for the first date of service for 1 hour and a second visit record for the next date of service for 6 hours. The PSO must present this text file to the ORR team in the format the EVV system will use to transmit it to the EVV Aggregator.
        i. The following fields should be highlighted in each file:
            1. Position 34 INDVMBR_MEDICAID ID
            2. Position 18 EMPLOYEE_SOCSEC_ VISA_PASSPORT
            3. Position 2 PROVIDER_NPI or Position 3 PROVIDER_API
            4. Position 51 VISIT_VISITDATE
            5. Position 52 VISIT_VISITTIMEIN
            6. Position 53 VISIT_VISITTIMEOUT
            7. Position 55 VISIT_VISITLOCATION
            8. Position 60 EVV_VISITDATE
            9. Position 63 EVV_CALLINTIME
            10. Position 64 EVV_CALLOUTTIME
            11. Position 65 EVV_ACTUALHOURS

12. Position 68 EVV_VISITLOCATION
13. Position 73 EVV_INPUTMETHOD_IN
14. Position 74 EVV_INPUTMETHOD_OUT
15. Position 58 EVV_HCPCS_CODE
16. Position 59 EVV_MODIFIER
17. Position 56 VISIT_SVCGRP (LTC FFS only)
18. Position 57 EVV_SVCCODE (LTC FFS only)

Note: If there is more than one reason code on the visit, highlight the reason code fields for this scenario.

19. Position 76 EVV_REASONCODE1
20. Position 77 EVV_REASONCODE1DESC
21. Position 78 EVV_REASONCODE1COMMENT

16.2. Mobile Method – Overnight Visit Without a Schedule

Note: HHSC may waive this scenario if the PSO is not using the Mobile Method (Question 24 is No).

Demonstration Steps

1. **Data Setup in the EVV System:**
   a. Member with a mobile method registered in the EVV System
   b. Service Attendant
2. **System User demonstrates, and ORR Team verifies that:**
   a. A Service Attendant clocks in at 11:00 PM using the mobile method.
   b. A Service Attendant clocks out the next day at 6:00 AM using the mobile method.
   c. The EVV system has accurately captured the following information (per SDV-1P):
      i. Member receiving the service
      ii. Service Attendant providing the service
      iii. Proprietary System Operator Business Unit the Service Attendant is performing the service on behalf of
      iv. Location where the service is delivered (home or community location, and correct GPS coordinates)
      v. Dates the service is performed overnight
      vi. Time the service is performed (clock in and clock out time)
      vii. Type of service performed (HCPCS/Modifiers and Service Group/Service Code, if applicable)
   d. The EVV system has accurately captured the type of method used (Mobile Method) .
   e. The text file to be submitted to the EVV Aggregator contains two visit records, one for the first date of service for 1 hour and a second visit record for the next date of service for 6 hours. The PSO must present this text file to the ORR team in the format the EVV system will use to transmit it to the EVV Aggregator.
      i. The following fields should be highlighted in each file:
         1. Position 34 INDVMBR_MEDICAID ID
         2. Position 18 EMPLOYEE_SOCSEC_ VISA_PASSPORT
         3. Position 2 PROVIDER_NPI or Position 3 PROVIDER_API

4. Position 60 EVV_VISITDATE
5. Position 63 EVV_CALLINTIME
6. Position 64 EVV_CALLOUTTIME
7. Position 65 EVV_ACTUALHOURS
8. Position 68 EVV_VISITLOCATION
9. Position 73 EVV_INPUTMETHOD_IN
10. Position 74 EVV_INPUTMETHOD_OUT
11. Position 58 EVV_HCPCS_CODE
12. Position 59 EVV_MODIFIER
13. Position 56 VISIT_SVCGRP (LTC FFS only)
14. Position 57 EVV_SVCCODE (LTC FFS only)

Note: If there is more than one reason code on the visit, highlight the reason code fields for this scenario.

15. Position 76 EVV_REASONCODE1
16. Position 77 EVV_REASONCODE1DESC
17. Position 78 EVV_REASONCODE1COMMENT

16.3. Alternative Device Method – Overnight Visit with Schedule

Note: HHSC may waive this scenario if the PSO is not using Alternative Device Method (Question 22 is No) or using Alternative Device Method but not using schedules (Question 11 is No).

Demonstration Steps

1. **Data Setup in the EVV System:**
   a. Member with an alternative device method registered in the EVV System
   b. Service Attendant
   c. Scheduled overnight visit (starts 11:00 PM, ends 6:00 AM the next day)
2. **System User demonstrates, and ORR Team verifies that**:
   a. A Service Attendant clocks in according to the schedule using the alternative device.
   b. A Service Attendant calls into the IVR with the clock in information recorded from the alternative device.
   c. A Service Attendant clocks out according to the schedule using the alternative device method.
   d. A Service Attendant calls into the IVR with the clock out information recorded from the alternative device.
   e. The EVV system has accurately captured the following information (per SDV-1P):
      i. Member receiving the service
      ii. Service Attendant providing the service
      iii. Proprietary System Operator Business Unit the Service Attendant is performing the service on behalf of
      iv. Location where the service is delivered (home)
      v. Dates the service is performed overnight
      vi. Time the service is performed (clock in and clock out time)
      vii. Type of service performed (HCPCS/Modifiers and Service Group/Service Code, if applicable)

       f. The EVV system has accurately captured the type of method used (Alternative Device).

       g. The text file to be submitted to the EVV Aggregator contains two visit records, one for the first date of service for 1 hour and a second visit record for the next date of service for 6 hours. The PSO must present this text file to the ORR team in the format the EVV system will use to transmit it to the EVV Aggregator.

          i. The following fields should be highlighted in each file:

1. Position 34 INDVMBR_MEDICAID ID
2. Position 18 EMPLOYEE_SOCSEC_ VISA_PASSPORT
3. Position 2 PROVIDER_NPI or Position 3 PROVIDER_API
4. Position 51 VISIT_VISITDATE
5. Position 52 VISIT_VISITTIMEIN
6. Position 53 VISIT_VISITTIMEOUT
7. Position 55 VISIT_VISITLOCATION
8. Position 60 EVV_VISITDATE
9. Position 63 EVV_CALLINTIME
10. Position 64 EVV_CALLOUTTIME
11. Position 65 EVV_ACTUALHOURS
12. Position 68 EVV_VISITLOCATION
13. Position 73 EVV_INPUTMETHOD_IN
14. Position 74 EVV_INPUTMETHOD_OUT
15. Position 58 EVV_HCPCS_CODE
16. Position 59 EVV_MODIFIER
17. Position 56 VISIT_SVCGRP (LTC FFS only)
18. Position 57 EVV_SVCCODE (LTC FFS only)

Note: If there is more than one reason code on the visit, highlight the reason code fields for this scenario.

19. Position 76 EVV_REASONCODE1
20. Position 77 EVV_REASONCODE1DESC
21. Position 78 EVV_REASONCODE1COMMENT

16.4. Alternative Device Method – Overnight Visit Without a Schedule

Note: HHSC may waive this scenario if the PSO is not using Alternative Device Method (Question 22 is No).

Demonstration Steps

1. **Data Setup in the EVV System:**
   a. Member with an alternative device method registered in the EVV System
   b. Service Attendant
2. **System User demonstrates, and ORR Team verifies that:**
   a. A Service Attendant clocks in at 11:00 PM using the alternative device method.
   b. A Service Attendant calls into the IVR with the clock in information recorded from the alternative device.

    c. A Service Attendant clocks out the next day at 6:00 AM using the alternative device method.

    d. A Service Attendant calls into the IVR with the clock in information recorded from the alternative device.

    e. The EVV system has accurately captured the following information (per SDV-1P):

        i. Member receiving the service

        ii. Service Attendant providing the service

        iii. Proprietary System Operator Business Unit the Service Attendant is performing the service on behalf of

        iv. Location where the service is delivered (home)

        v. Dates the service is performed overnight

        vi. Time the service is performed (clock in and clock out time)

        vii. Type of service performed (HCPCS/Modifiers and Service Group/Service Code, if applicable)

    f. The EVV system has accurately captured the type of method used (Alternative Device).

    g. The text file to be submitted to the EVV Aggregator contains two visit records, one for the first date of service for 1 hour and a second visit record for the next date of service for 6 hours. The PSO must present this text file to the ORR team in the format the EVV system will use to transmit it to the EVV Aggregator.

        i. The following fields should be highlighted in each file:

            1. Position 34 INDVMBR_MEDICAID ID

            2. Position 18 EMPLOYEE_SOCSEC_ VISA_PASSPORT

            3. Position 2 PROVIDER_NPI or Position 3 PROVIDER_API

            4. Position 60 EVV_VISITDATE

            5. Position 63 EVV_CALLINTIME

            6. Position 64 EVV_CALLOUTTIME

            7. Position 65 EVV_ACTUALHOURS

            8. Position 68 EVV_VISITLOCATION

            9. Position 73 EVV_INPUTMETHOD_IN

            10. Position 74 EVV_INPUTMETHOD_OUT

            11. Position 58 EVV_HCPCS_CODE

            12. Position 59 EVV_MODIFIER

            13. Position 56 VISIT_SVCGRP (LTC FFS only)

            14. Position 57 EVV_SVCCODE (LTC FFS only)

Note: If there is more than one reason code on the visit, highlight the reason code fields for this scenario.

            15. Position 76 EVV_REASONCODE1

            16. Position 77 EVV_REASONCODE1DESC

            17. Position 78 EVV_REASONCODE1COMMENT

16.5. Landline Method – Overnight Visit with Schedule

Note: HHSC may waive this scenario if the PSO is not using Landline (Question 21 is No) or using Landline Method but not using Schedules (Question 11 is No).

Demonstration Steps

1. **Data Setup in the EVV System:**
   a. Member with a landline method registered in the EVV System
   b. Service Attendant
   c. Scheduled overnight visit (starts 11:00 PM, ends 6:00 AM the next day)
2. **System User demonstrates, and ORR Team verifies that**:
   a. A Service Attendant calls into the IVR with the clock in information according to the schedule.
   b. A Service Attendant calls into the IVR with the clock out information according to the schedule.
   c. The EVV system has accurately captured the following information (per SDV-1P):
      i. Member receiving the service
      ii. Service Attendant providing the service
      iii. PSO Business Unit the Service Attendant is performing the service on behalf of
      iv. Location where the service is delivered (home)
      v. Dates the service is performed overnight
      vi. Time the service is performed (clock in and clock out time)
      vii. Type of service performed (HCPCS/Modifiers and Service Group/Service Code, if applicable)
   d. The EVV system has accurately captured the type of method used (Landline).
   e. The text file to be submitted to the EVV Aggregator contains two visit records, one for the first date of service for 1 hour and a second visit record for the next date of service for 6 hours. The PSO must present this text file to the ORR team in the format the EVV system will use to transmit it to the EVV Aggregator.
      i. The following fields should be highlighted in each file:
         1. Position 34 INDVMBR_MEDICAID ID
         2. Position 18 EMPLOYEE_SOCSEC_ VISA_PASSPORT
         3. Position 2 PROVIDER_NPI or Position 3 PROVIDER_API
         4. Position 51 VISIT_VISITDATE
         5. Position 52 VISIT_VISITTIMEIN
         6. Position 53 VISIT_VISITTIMEOUT
         7. Position 55 VISIT_VISITLOCATION
         8. Position 60 EVV_VISITDATE
         9. Position 63 EVV_CALLINTIME
         10. Position 64 EVV_CALLOUTTIME
         11. Position 65 EVV_ACTUALHOURS
         12. Position 68 EVV_VISITLOCATION
         13. Position 73 EVV_INPUTMETHOD_IN
         14. Position 74 EVV_INPUTMETHOD_OUT
         15. Position 58 EVV_HCPCS_CODE
         16. Position 59 EVV_MODIFIER
         17. Position 56 VISIT_SVCGRP (LTC FFS only)
         18. Position 57 EVV_SVCCODE (LTC FFS only)
      Note: If there is more than one reason code on the visit, highlight the reason code fields for this scenario.
         19. Position 76 EVV_REASONCODE1

20. Position 77 EVV_REASONCODE1DESC
21. Position 78 EVV_REASONCODE1COMMENT

16.6. Landline Method – Overnight Visit Without a Schedule

Note: HHSC may waive this scenario if the PSO is not using Landline Method (Question 21 is No).

Demonstration Steps

1. **Data Setup in the EVV System:**
   a. Member with a landline registered in the EVV System
   b. Service Attendant
2. **System User demonstrates, and ORR Team verifies that**:
   a. A Service Attendant calls into the IVR recording 11:00 PM for day one as the clock in information.
   b. A Service Attendant calls into the IVR recording 6:00 AM the next day as the clock out information.
   c. The EVV system has accurately captured the following information (per SDV-1P):
      i. Member receiving the service
      ii. Service Attendant providing the service
      iii. Proprietary System Operator Business Unit the Service Attendant is performing the service on behalf of
      iv. Location where the service is delivered (home)
      v. Dates the service is performed overnight
      vi. Time the service is performed (clock in and clock out time)
      vii. Type of service performed (HCPCS/Modifiers and Service Group/Service Code, if applicable)
   d. The EVV system has accurately captured the type of method used (Landline).
   e. The text file the EVV system will submit to the EVV Aggregator contains two visit records, one for the first date of service for 1 hour and a second visit record for the next date of service for 6 hours. The PSO must present this text file to the ORR team in the format the EVV system will use to transmit it to the EVV Aggregator.
      i. The following fields should be highlighted in each file:
         1. Position 34 INDVMBR_MEDICAID ID
         2. Position 18 EMPLOYEE_SOCSEC_ VISA_PASSPORT
         3. Position 2 PROVIDER_NPI or Position 3 PROVIDER_API
         4. Position 60 EVV_VISITDATE
         5. Position 63 EVV_CALLINTIME
         6. Position 64 EVV_CALLOUTTIME
         7. Position 65 EVV_ACTUALHOURS
         8. Position 68 EVV_VISITLOCATION
         9. Position 73 EVV_INPUTMETHOD_IN
         10. Position 74 EVV_INPUTMETHOD_OUT
         11. Position 58 EVV_HCPCS_CODE
         12. Position 59 EVV_MODIFIER
         13. Position 56 VISIT_SVCGRP (LTC FFS only)

14. Position 57 EVV_SVCCODE (LTC FFS only)

Note: If there is more than one reason code on the visit, highlight the reason code fields for this scenario.

15. Position 76 EVV_REASONCODE1
16. Position 77 EVV_REASONCODE1DESC
17. Position 78 EVV_REASONCODE1COMMENT

17. PAO-8P & PAO-9P

Business Rules

PAO-8P: EVV System must create a unique profile for each Service Attendant containing the Service Attendant identification Information listed in PAO-9P (at a minimum). This includes CDS Employees.

PAO-9P: EVV System must electronically document the following data elements for the Service Attendant identification information:
- Texas EVV Service Attendant Identification Number
- Legal Name (Last, First, MI)
- Permanent address (Street, City, State, ZIP+4)

17.1. Service Attendant Profile

Demonstration Steps

1. **Data Setup in the EVV System:**
   a. Service Attendant Profile for 5 individuals.
   b. Visits delivered by each of the Service Attendants.
   c. At least one Service Attendant must be a CDS employee.
      i. This setup in the scenario may be waived if the PSO is not an FMSA (Detailed Questionnaire 4 is No).
2. **System User demonstrates, and ORR Team verifies that:**
   a. Each Service Attendant profile must include the following data to meet the business rule:
      i. Texas EVV Service Attendant Identification Number: Last 4 digits of the SSN or passport number plus last name
      ii. Legal Name (last name, first name, middle initial)
      iii. Permanent address (Street, City, State, ZIP+4)
   b. If the PSO is an FMSA then a Service Attendant can be demonstrated as a CDS employee by showing one or more visit transactions demonstrating that the Service Attendant performed EVV services for a Member who is a CDS employer.

18. PAO-14P & PAO-15P

Business Rules

PAO-14P: EVV System must create a unique profile for each Member receiving services containing the identification Information listed in PAO-15P (at a minimum).

PAO-15P: EVV System must electronically document the following data elements for the Members identification information:
- Texas Medicaid Identification Number
- Legal Name (Last, First, MI)
- Date of Birth
- Medicaid Eligibility start date
- Medicaid Eligibility end date
- Managed Care Eligibility start date
- Managed Care Eligibility end date
- Address (Street, City, State, ZIP+4)
- Landline Home phone number

18.1. Member Profile

Demonstration Steps

1. **Data Setup in the EVV System:**
   a. Member Profiles for 3 individuals.
      i. 1 Member who is not enrolled in managed care
      ii. 2 Members who are enrolled in managed care
2. **System User demonstrates, and ORR Team verifies that:**
   a. Each Member profile must include the following data to meet the business rule:
      i. Texas Medicaid Identification Number (nine-digit identifier)
      ii. Legal Name (last name, first name, middle initial)
      iii. Date of Birth
      iv. Medicaid Eligibility start date
      v. Medicaid Eligibility end date
      vi. Managed Care Eligibility start date (if applicable)
      vii. Managed Care Eligibility end date (if applicable)
      viii. Address (Street, City, State, ZIP+4)
      ix. Landline Home phone number