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

Expedited Path Process
Version: 1.2

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

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

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

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

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

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

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

Important Note: A program provider or FMSA wishing to onboard with a previously approved proprietary system who isn't approved for EVV functionality that the program provider or FMSA requires, must complete a modified Standard Path ORR with the previously approved proprietary system vendor to get approval to use the new functionality.

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

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

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

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

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

Task	Responsible Party	Due Date	Notes & Resources
1. Program provider or FMSA must access and review all PSO technical requirements, HHSC EVV Policy Handbook and the HHSC EVV Business Rules for Proprietary Systems. Program provider or FMSA is responsible for coordinating onboarding activities with their selected proprietary system.	Program provider or FMSA	Prior to the submission of the EVV Proprietary System Request Form.	• [TMHP EVV Proprietary System Web Page](#) • [HHSC EVV Proprietary Systems Web Page](#) • [EVV Policy Handbook](#) • [EVV Policy Handbook- Section 5000](#) ***Note: Per Section 5040 in the HHSC EVV Policy Handbook: Program provider or FMSA is responsible for ensuring that their selected EVV Proprietary System is fully developed and compliance with HHSC EVV Policy and Business Rules prior to the ORR Start Date.**
2. Program provider or FMSA must complete and submit EVV Proprietary System Request Form via EVV Portal. Program provider or FMSA will receive a Confirmation Number (unique Request Form ID) upon successful submission of the Request Form.	Program provider or FMSA	Anytime throughout the year.	• TMHP will review and validate information and update Request Form Status. • Validated Request Forms will be placed on the PSO Waitlist based on the Request Form submission date and time. ***Note:** EVV Portal access is required to submit a request form. Refer to the [Accessing the EVV Portal for Program Providers and FMSAs job aid](#) for more information. Request forms that are emailed to HHSC or TMHP will not be accepted. ***Note: The submission of a request form does not guarantee an assignment to a PSO ORR session. TMHP will review the submitted Request Form and PSO ORR session requirements.**
3. TMHP assigns the program provider or FMSA and PS Vendor, via email invitation, to an Expedited Path ORR session.	TMHP	After Request Form	• ORR assignments are made based on the position on the PSO Waitlist, ORR

Task	Responsible Party	Due Date	Notes & Resources
		validation is completed.	requirements and available slots for Expedited ORRs.
4. Program provider or FMSA in conjunction with their PS Vendor **must accept** the Expedited Path ORR session assignment bia email by the deadline in the invitation email.	Program provider or FMSA, PS Vendor, TMHP	Five (5) business days after the ORR invitation email is sent to program provider or FMSA.	• Email to: EVV_PSO@tmhp.com ***Note: Failure to respond by the deadline may result in removal from the assigned Expedited Path ORR session.**
5. Program provider or FMSA and PS Vendor must successfully submit a test transaction to the TMHP testing environment to confirm TMHP EVV System Access and Connectivity.	Program provider or FMSA, PS Vendor, TMHP	20 business days prior to the assigned ORR Start Date.	• TMHP technical support as needed • TMHP to set up testing environment for program provider or FMSA and PS Vendor. • Program provider or FMSA and PS Vendor to submit a test transaction to the TMHP EVV Aggregator testing environment. ***Note: As per the State's policy, TMHP secure file transfer protocol (SFTP) accounts must be used to transmit EVV visit transactions every 89 calendar days to remain active. Program provider or FMSA must ensure the PS vendor has an active SFTP account. Failure to submit a test EVV visit transaction or access the system within 90 days may result in your account being deactivated and may cause a delay to re-establish connectivity and to complete the connectivity phase of the ORR.**
6. Program provider or FMSA and the selected PS vendor must attend an ORR Planning Meeting with HHSC and TMHP. Failure to attend the ORR Planning Meeting may result in removal from the Expedited Path ORR session.	Program provider or FMSA, PS vendor, TMHP, HHSC	Ten (10) business days prior to the assigned ORR session.	• TMHP will review all technical, Demonstration and Documentation requirements. • TMHP will discuss Go-Live requirements • TMHP will review next steps ***Note: Per Section 5040 in the HHSC EVV Policy Handbook: Program provider or FMSA is responsible for ensuring that their selected EVV Proprietary System is fully developed and compliance with HHSC EVV Policy and Business Rules prior to the ORR Start Date.**
7. Program provider or FMSA **must submit** the customized and signed Certification Form to TMHP.	Program provider or FMSA	ORR Start Date.	• HHSC Certification Form • Email to: EVV_PSO@tmhp.com
8. Program provider or FMSA and PS Vendor must successfully submit an EVV transaction file to the TMHP testing environment to confirm the TMHP EVV System Access and Connectivity. *If the Program provider has more than one associated NPI, only one EVV transaction file is required for each unique TMHP Vendor ID.*	Program provider or FMSA, PS Vendor, TMHP	During scheduled Connectivity Testing.	• TMHP technical support is provided as needed. • Submitted EVV transaction file should not be rejected.

Task	Responsible Party	Due Date	Notes & Resources
9. Program provider or FMSA must ensure that their PS Vendor submits the required TMHP Connectivity technical information which includes: *NPI associated with each program provider or FMSA agency that will be used during TPT if required.*	Program provider or FMSA, PS Vendor, TMHP	During scheduled Connectivity Testing.	• TMHP technical support will be provided as needed. • PS Vendor must submit completed TMHP Connectivity document by Wednesday COB during their Connectivity Testing time frame.
10. TMHP informs program provider or FMSA via email of HHSC's approval or denial to use the selected proprietary system to submit EVV visits to the TMHP Aggregator.	TMHP	Following the completion of the assigned ORR.	For approval: • Program provider or FMSA is notified of their Approval and TMHP will request the Go-Live date to onboard with the PS Vendor. For rejection: • Ask program provider or FMSA if they wish to be placed on a waiting list for a future session
11. Program provider or FMSA submits Go-Live Date	Program provider or FMSA, PS Vendor	Three (3) business days after approval notification.	Program provider or FMSA and their PS vendor must consider the following: • Current EVV System Termination requirements. • Data Transfer timeframe required by current EVV system. • Time to train staff on the new EVV system. ***Note: Failure to respond by the deadline may result in removal from the assigned Expedited Path ORR session.**
12. TMHP informs PSO via email of approval or rejection of the Go-Live Date.	TMHP	Following confirmation of Go-Live Date.	For approval: • TMHP approval is documented via email. For rejection: • Explanation of rejection is provided with Go-Live Date options. • PSO will be directed to submit new Go-Live date for HHSC and TMHP approval within three (3) business days of rejection notification email.
13. TMHP provides PSO Approval or Denial Letter via email electronic attachment.	TMHP	Following confirmation of Go-Live Date.	For approval: • Transmit acceptance letter to PSO's Signature Authority For rejection: • Transmit rejection letter to program provider or FMSA Signature Authority
14. PSOs currently onboarded with an EVV System vendor must submit a Termination Form within the timeframes required by the current EVV system vendor and before the approved Go-Live Date.	Program provider or FMSA	As required by current EVV System before Go-Live Date.	• Program provider or FMSA must reach out to their current EVV system vendor to determine requirements for submission of a Termination Form and data transfer timeframes. • Program provider or FMSA must determine go-live with the new EVV system based on termination notice and data transfer timeframe requirements of the current EVV system vendor within and TMHP's go-live requirements.

Task	Responsible Party	Due Date	Notes & Resources
			• Program Providers must ensure with their vendors the ability for visit maintenance and visit maintenance unlock requests.
15. PSO may perform Data Transfer from current EVV System to new EVV System (when applicable).	PSO	As required by current EVV System before Go-Live Date.	• TMHP provides support as necessary (if transferring from the State EVV Vendor). • TMHP and PSO will work with PSO's current EVV System (when applicable) for data transfer. • TMHP will provide approval to the State EVV Vendors to provide data transfer files to the PSO (when applicable). • Program Providers must ensure with their vendors the ability for visit maintenance and visit maintenance unlock requests.
16. TMHP implements production changes for the PSO Go-Live.	TMHP, PS Vendor	Ten (10) business days before their Go-Live date.	• TMHP sets up security access, and PSO system information (Vendor ID, Display Name, and the NPI/API to EVV System crosswalk) in the production environment for the EVV Aggregator.
17. PS Go-Live activity for the PSO(s)	Program provider or FMSA and PS Vendor	Go-Live Date	• Setting up system access for all system users including PSO, HHSC and MCOs.
18. TMHP and HHSC verify production system operation.	TMHP, HHSC	Go-Live Date plus up to 30 business days.	• TMHP and HHSC monitor through internal metrics. • TMHP updates the list of EVV Proprietary Systems Approved by HHSC (if applicable).