



EVV Active Proprietary System Operator Workgroup Minutes

Date	January 29th, 2025
Time Duration	1:00 P.M. CST to 2:30 P.M. CST
Webinar Link Location	https://attendee.gotowebinar.com/register/2765996765905565269 Webinar Only
Contact	For questions related to this meeting, please contact: EVV_PSO@tmhp.com / EVVPSO@hhs.texas.gov

Attendees/Invitees

EVV Active PSO Workgroup	
Wed, Jan 29, 2025 12:19 pm CST	
Registrants	587
Attendees	385
Attendance Rate	66%

Purpose

- The purpose of the EVV Active PSO Workgroup meeting is to share information between HHSC, TMHP, the operational PSOs and the approved proprietary system vendors that may impact a PSO’s daily operations or compliance requirements.
- Topics for this workgroup are limited to operational PSO concerns and questions. Questions or concerns related to other PSO topics such as the PSO waitlist and onboarding requirements will be handled separately outside of the workgroup. Non-operational PSO concerns or questions should be emailed to TMHP EVV PSO at evv_pso@tmhp.com and HHSC EVV PSO at evvpso@hhs.texas.gov.

Agenda

1. Welcome/Introductions

Presenter: Jesse Riordan, TMHP EVV PSO Operations

Duration: 3 minutes

- **Please note that HHSC doesn't allow the use of "chat bots" of any kind, including ones to record the meetings.**
- The [TMHP Active PSO Workgroup](#) Webpage will be updated with the minutes from today's workgroup meeting.
- Due to the large number of participants invited, all participants are muted when the webinar begins and will remain muted throughout the meeting. Participants must submit all questions through the GoToWebinar questions pane.

Materials and Resources

1. [HHSC EVV webpage](#)
2. [HHSC EVV Proprietary Systems Webpage](#)
3. [TMHP EVV Proprietary Systems Webpage](#)
4. [EVV Active PSO Workgroup Webpage](#)

Minutes:

Topic presented, any questions and responses related to topic are below.

2. Action Items Review from Prior Meeting

Presenter: Jesse Riordan, TMHP EVV PSO Operations

Duration: 2 minutes

- There are no open action items for the Active PSO Workgroup

Minutes:

Topic presented, any questions and responses related to topic are below.

3. General Update – News from webpage related to PSOs

Presenter: Lauren Poston, TMHP EVV PSO Operations

Duration: 5 minutes

- **December 2024**
 - [EVV Active PSO Workgroup Information Now Available on EVV Proprietary Systems Web Page -12/27/2024](#)
 - [EVV Impacts due to Medicare-Medicaid Plans \(MMPs\) Pilot Program Non-Renewing in Select Service Areas, Effective Jan. 1, 2025-12/23/2024](#)

Materials and Resources

1. [HHSC EVV Proprietary Systems Webpage](#)
2. [TMHP EVV Proprietary Systems Webpage](#)
3. [GovDelivery - Sign up to receive EVV email updates](#)

Minutes:

Topic presented, any questions and responses related to topic are below.

4. Managed Care (MCO) Updates Impacting PSOs

Presenter: Rae Harris, HHSC EVV Operations

Duration: 5 minutes

- [Dual Demonstration MMPs Pilot Program Discontinued in Select Service Areas Effective January 1, 2025- 11/01/2024- 11/01/2024](#)
- [Impacts due to the MMPs that ended on 12/31/2024](#)

Materials and Resources

1. [HHSC EVV webpage](#)
2. [HHSC EVV Proprietary Systems Webpage](#)

Minutes:

Topic presented, any questions and responses related to topic are below.

5. Compliance Updates and Reminders

Presenters: Yatinkumar Akbari, TMHP EVV PSO Operations

Duration: 30 minutes

- PSOs should note that they are a program provider or FMSA that has been approved to use an EVV proprietary system and are still required to comply with all policies applicable to program providers or FMSAs.
- PSOs are responsible for ensuring their Proprietary Systems are complying with the current Business Rules. Provider PSOs and FMSA PSOs are responsible for required EVV Training as listed in EVV Training policy (Section 4200 of the EVV Policy Handbook)
 - See [EVV Training Requirements Checklists \(PDF\)](#) for System, Provider and/or FMSA training responsibilities.
- Top 10 Reasons for Rejections (for all PSOs for December 2024)

Edit_Code	Edit_Description	% of top 10
Ex00031C	The Member's Payer on the EVV visit does not match our records for this Member.	43.10%
Ex00043C	The plan code on the visit is not associated with the Member's Payer.	16.89%



Ex0007C2	Member on the EVV visit is not authorized for this Provider Number on this visit date in our records.	15.98%
Ex00057C3	The Member on the EVV visit is not authorized for this service group/service code on this visit date in our records.	13.29%
Ex00034C2	The Member Medicaid ID on the EVV visit does not have active Medicaid eligibility for the visit date.	6.01%
Ex0002C	Provider NPI cannot be validated as active for the visit date.	2.48%
Ex0007C1	The Provider Number on the EVV visit is not associated with this provider NPI/API for the Visit Date.	1.28%
Ex00028B	CDS Employer EVV ID is required when service is CDS service.	0.54%
Ex00034C1	The Member Medicaid ID on the EVV visit is not found in our records.	0.25%
Ex00054A	The Visit Hours on the EVV visit is not in a valid numeric format.	0.18%

- The impacted PSOs have been notified and are working with TMHP to correct the issues to remain in compliance with BRs and EVV policy.
- Questions

Materials and Resources

1. [Electronic Visit Verification \(EVV\) Visit Transaction Rejection Guide](#)

Minutes:

Topic presented, any questions and responses related to topic are below.

6. HHSC/AMD System Updates

Minutes:

Topic presented, any questions and responses related to topic are below.

Presenter: Yvette Walters, HHSC EVV Operations

Duration: 5 minutes

- No updates
- Questions

Materials and Resources

- 1.

Minutes:

Topic presented, any questions and responses related to topic are below.

7. Business Rule Updates

Presenter: Sam Darby, HHSC EVV Operations

Duration: 5 minutes



- Criteria when updating the Last Visit Maintenance Date is required:
 - Last Visit Maintenance Date (LVMD) must be updated when one or more of the visit transaction fields listed in SDV-56P are changed.
 - LVMD must also be updated when the System User clears an exception from a visit that did not auto-verify.
 - This includes when the System User enters a manual visit.
 - Refer to SDV-4P and Appendix M.
- Questions

Materials and Resources

1. [TMHP PSO Business Rule Webpage.](#)
2. HHSC EVV PSO Mailbox (EVVPSO@hhs.texas.gov).

Minutes:

Topic presented, any questions and responses related to topic are below.

8. PSO Operational Updates

Presenter: Lauren Poston, TMHP EVV PSO Operations

Duration: 5 minutes

- FMSA PSOs are now able to retrieve CDS Usage reports for CDS Employers. CDS Employers should coordinate issues with retrieving their CDS Usage Report with their FMSA and the Proprietary System Vendor.
- Phase I (Session V) of the BR v3.1 compliance ORR- Visit Maintenance (VM) Process for Proprietary Systems Testing and ORR was completed in December 2024. 8 PS vendors participated in the Phase I compliance ORR to be able to import legacy visits and allow PSOs to complete VMUR on those legacy visits. Two PS vendors did not complete the Phase I compliance ORR and must complete this component as part of the BR v3.1 Phase II compliance ORR.
 - PSOs using the proprietary systems that delayed the Phase I compliance ORR will not be able to complete VM of legacy visits until March 2025 when those proprietary systems have successfully passed both Phase I and Phase II compliance ORRs in early 2025.
 - PS vendors that passed the VMUR ORR have notified their PSOs.
 - PSOs will be able to complete VMURs after HHSC releases the hold on legacy visit VMURs.
 - Continue to monitor HHSC GovDelivery Notice for release of the hold on legacy visit VMURs coming soon.
- All proprietary systems must pass both Phase I and Phase II compliance ORRs to remain compliant with BR v3.1 no later than 3/12/25
- BR v3.1 Phase II compliance ORR
 - TMHP will notify PS vendors of available slots and requirements for the Phase II compliance ORRs in upcoming weeks. PS Vendors should prepare to complete these ORRs between January and early March of 2025.
- Revised Compliance Documents for BR v3.1



- PSOs will receive revised Certification Forms and Approval Letters in April 2025 to reflect their compliance with BR v3.1, after all scheduled compliance ORRs are completed.
- Proprietary systems that are not compliant by 3/12/25 must continue to schedule demonstrations to become compliant. Non-compliant proprietary systems cannot onboard new providers or FMSAs until they are compliant with BR v3.1.
- Questions

Materials and Resources

1. [EVV Proprietary Systems | TMHP](#)
2. TMHP PSO Mailbox: evv_pso@tmhp.com

Minutes:

Topic presented, any questions and responses related to topic are below.

9. 2024 Operational Readiness Review (ORR) Status Update

Presenter: Lauren Poston, TMHP EVV PSO Operations
 Duration: 5 minutes

- PSO Onboarding Sessions
 - Sessions posted on [TMHP EVV Proprietary System webpage](#)
 - **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. Please ensure you review the updated [PSO Onboarding Standard Process Overview and Timeline](#).

Session	Expected PSOs	Planning Meeting Date	ORR Start Date	Session Approval Date	Earliest Go-Live Date
2025-1: Standard	3 PS Vendors	Jan. 21, 2025	Feb. 3, 2025	Mar. 19, 2025	May 1, 2025
2025-2: Standard	10 PS Vendors	Apr. 15, 2025	May 1, 2025	Jun. 11, 2025	Jul. 15, 2025
2025-3: Expedited	200 Program providers or FMSAs	Jul. 1, 2025	Jul. 7, 2025	Aug. 4, 2025	Sept. 1, 2025
2025-4: Standard	10 PS Vendors	Sept. 9, 2025	Sept. 22, 2025	Nov. 28, 2025	Dec. 1, 2025
2025-5: Expedited	200 Program providers or FMSAs	Jan. 6, 2026	Jan. 12, 2026	Feb. 9, 2026	Mar. 15, 2026

- As of 01/14/2025, there are 899 operational PSOs and 11 approved PS Vendors.
 - 2024 Sessions:
 - Session 3- Standard completed on 7/18/2024.

Note: The agenda is subject to change.



- 3 Providers will go live as PSOs on 3/31/2025.
 - Session 4- Expedited completed on 9/24/2024.
 - 242 Providers began Go-Live on 11/1/2024.
- 2025 Sessions:
 - Session 1- Standard was scheduled to begin on Jan. 21, 2025.
 - Session 2- Standard testing begins on Apr. 28, 2025 and invitations will be delivered.
 - As of 01/14/2025, 5 providers will participate.
 - Session 3- Expedited testing begins on Jul. 7, 2025
 - As of 01/14/2025, 44 Providers will participate.
 - Session 4- Standard testing begins on Sept. 22, 2025.
 - As of 01/14/2025, 1 provider will participate.
- The updated [EVV Proprietary Systems Approved by HHSC](#) was published on the TMHP EVV Proprietary Systems webpage.
 - 11 approved proprietary systems.
 - Updated and published on 12/23/2024.
 - This document has been updated to reflect the addition of Visit Maintenance Legacy Visit import ability.
- Questions

Materials and Resources

1. [TMHP EVV Webpage - EVV Proprietary Systems](#)
2. [EVV Proprietary Systems Approved by HHSC \(PDF\)](#)
3. [EVV Proprietary System Access and Training Guide \(Excel\)](#)
4. TMHP PSO Mailbox: evv_pso@tmhp.com

Minutes:

Topic presented, any questions and responses related to topic are below.

10. EVV Policy and Texas Administrative Code (TAC) Rules

Presenter: Sarah Hambrick, HHSC EVV Operations

Duration: 5 minutes

- Visit Maintenance Unlock Requests (VMUR).
 - GovDelivery notice regarding the new policies, templates and job aids was sent January 7, 2025.
 - New VMUR standalone policy, [9060 Visit Maintenance Unlock Request Policy \(PDF\)](#) published on the EVV website December 31, 2024.
 - PSOs will have 20 business days to complete visit maintenance once notified the visit transaction is unlocked.
 - The EVV system vendor will return incorrect or incomplete VMURs.
 - You may request more time by the visit maintenance deadline. Contact your EVV system vendor for procedures for requesting more time.



- The standalone policy will be incorporated into the EVV handbook in an upcoming revision.
- PSOs may begin submitting VMURs in January.
- 89th Legislative Session
 - Session begins January 14, 2025 (1st day).
 - No EVV bills.
- Questions

Materials and Resources

1. [HHSC EVV webpage](#)

Minutes:

Topic presented, any questions and responses related to topic are below.

11. Review Future Meeting Dates

Presenter: Jesse Riordan, TMHP EVV PSO Operations

Duration: 3 minutes

- Future Meeting Dates:
 - March 26, 2025 – 1:00 pm – 2:30 pm CST
 - May 28, 2025 – 1:00 pm – 2:30 pm CST
 - July 30, 2025 – 1:00 pm – 2:30 pm CST
 - September 24, 2025 – 1:00 pm – 2:30 pm CST
 - November 19, 2025 – 1:00 pm – 2:30 pm CST
- Questions

Minutes:

Topic presented, any questions and responses related to topic are below.

12. Review Action Items

Presenter: Jesse Riordan, TMHP EVV PSO Operations

Duration: 2 minutes

- Outstanding action items
- New action items

Minutes:

Topic presented, any questions and responses related to topic are below.

13. Discussion on Future Agenda Items

Presenter: Jesse Riordan, TMHP EVV PSO Operations

Duration: 1 minute

- Request agenda topics for next meeting.
- Workgroup members may submit their suggestions for agenda topics to the EVV PSO Mailbox (EVV_PSO@tmhp.com) up to 2 weeks prior to the next meeting.

Minutes:

Topic presented, any questions and responses related to topic are below.

14. Adjournment

Presenter: Jesse Riordan, TMHP EVV PSO Operations

Duration: 1 minutes

Minutes:

Topic presented, any questions and responses related to topic are below.

15. Questions Received during Workgroup

If you have unanswered questions or would like clarification on a response, please send your questions to TMHP PSO Team EVV_PSO@tmhp.com or the HHSC PSO Team evvpsa@hhs.texas.gov.

Question: When we get to the PSO ORR update, can you please advise on what the waitlist looks like for standard vs expedited paths for the 2025 sessions?

Response: Currently, there are still available ORR slots in both Standard Path and Expedited Path sessions. Please see the number of ORR slots available in Section 9 of the meeting minutes.

Question: Regarding the alternative device reduction, is it based on the total number of clients, or is it broken up by insurance starting on 9/1/2025?

Response: The alternative device reduction is based on the total number of visit transactions completed using an alternative device, compared to the total number of transactions. Compliance for program providers will be measured on the NPI or provider number level, while compliance in the CDS option will be assessed on the CDS employer/member level.

Question: What selected services area were disconnected and for what reason?

Response: STAR+PLUS Medicare-Medicaid plan (MMP) services are discontinued for Superior HealthPlan (in Bexar service area) and Wellpoint (in Bexar, El Paso, Harris, and Tarrant service areas) The reason is that Superior and Wellpoint are no longer in those service areas.

Question: I mean MMP plan (in reference to question above)

Response: STAR+PLUS Medicare-Medicaid plan (MMP) services are discontinued for Superior HealthPlan (in Bexar service area) and Wellpoint (in Bexar, El Paso, Harris, and Tarrant service areas) The reason is that Superior and Wellpoint are no longer in those service areas.

Question: I submitted a question regarding unlocking EVV visits for a client with the service code description: ATTENDANT CARE SERVICES. The Electronic Visit Verification (EVV) Visit Maintenance Unlock Request (VMUR) form only includes a limited list of options, and I'm unsure which to select for my VMUR to be approved. Can you advise on the next steps?

Response: The VMUR Template is being updated to include the missing programs and will be published soon. Watch for the GovDelivery notification of the revised VMUR Template. Thank you.

Question: Is this certification process applicable to new PSOs, or does it also apply to existing PSOs? I believe I have already completed this process previously, but I want to confirm whether any additional steps are needed.

Response: The Certification Form documents the business rule version that a PSO is approved for. A new certification form must be signed by the PSO's signature authority to acknowledge that their proprietary system is compliant with the new business rule version.

Question: Is this certification required annually, and who will send the email with the certification form?

Response: Certification will be required for any new Business Rule version.

Question: How do we complete the BR v3.1 certification?

Response: Proprietary System Vendors are currently participating in Compliance Testing for BR v3.1, outcomes will be provided at the end of the session period.

Question: I don't seem to have this document in my email. Could you send it to me for reference, please?

Response: Proprietary System Operators will receive an updated PSO Certification Form from TMHP at the conclusion of the compliance testing for HHSC EVV Business Rules version 3.1. This is scheduled to occur in April of 2025.

Question: If I completed this certification last year, does that count as re-certification for this year, or do I need to complete the process again? Additionally, when is the certification required to be completed annually, and who will be sending the certification email so I could verify?

Response: Updated Certification Forms are required with any Business Rule updates, such as the changes from BR v3.0 to BR v3.1 and any time that a PSO is interested in adding additional functionality to their system.

Question: Will these certification forms be sent to Program Providers or to the PS Vendors?

Response: Certification forms will be sent to Proprietary System Operators. A program provider or FMSA that receives TMHP approval to use an EVV proprietary system is known as a Proprietary System Operator (PSO).

Question: Will you be sending out the certification and what date to expect it?

Response: The Certification Form for BR v3.1 will be sent out to operational PSOs in April of 2025.

Question: Is the certification form the same one available on the TMHP web portal?

Response: No, the PSO Certification Form is a customized form that the Program Provider or FMSA must sign to certify compliance with HHSC EVV Policy and the HHSC EVV Business Rules for Proprietary Systems. The PSO Request Form is the form on the EVV Portal that the Program Provider or FMSA submits to request to use an EVV Proprietary System.

Question: For agencies in Session 4, how are they expected to submit EVV data between now and the go-live in September 2025?

Response: You must continue to use your current EVV system until your approved go-live date with an HHSC-approved proprietary system.

Question: I joined the meeting late. Can you briefly describe the new changes, or is the meeting being recorded? Can I get a copy?

Response: The meeting minutes for today's meeting will be posted on the TMHP EVV Active PSO Workgroup webpage

Question: I have a question unrelated to onboarding. I was referred by someone at EVV@hhs.texas.gov to my program representative for a question about EVV Mobile. How can I find my program representative?

Response: All operational PSOs should contact their proprietary system vendor if they are having issues or have any questions about the mobile application, including questions about training on their mobile application.

Question: I have a question unrelated to onboarding. I was referred by someone at EVV@hhs.texas.gov to my program representative for a question about EVV Mobile. How

can I find my program representative?

Response: Please send the details of your question to the HHSC PSO Team at evvpsso@hhs.texas.gov. Please include all details regarding your PSO NPI #, PS Vendor Name, your name, your title, your contact information, email, phone #, your question regarding Mobile App use, Program services are authorized and provider through, Payer of the services, and any other information helpful to understand your question.

Question: I've been with Vesta as my preferred PSO for the last two years. How does this apply to my company to ensure that I'm updated as a PSO? Do we need to attend other sessions or take any other actions?

Response: Please contact EVV_PSO@tmhp.com for additional information and to confirm your current PSO status.

Question: For the updated VMUR, only our agency name appears in the 'current EVV' dropdown list, while our PS vendor is listed in the 'former EVV' dropdown. Will an additional version be released, or is the 'current EVV' cell meant to indicate the PSO?

Response: Per the Instructions tab, the Current EVV System field in the VMUR is the State vendor (HHAExchange) or the legal entity name for the PSO.

Question: How often are Reason Codes updated, and what Reason Code should be used for a perfect visit that was manually linked?

Response: HHSC will need more detailed information to provide a proper response to your question. Please send your detailed question to the HHSC PSO Team at evvpsso@hhs.texas.gov. Please include the full legal entity name of the PSO, the Proprietary System Vendor name and the circumstances around the visit that did not auto-verify. Please explain what you mean by the statement "a perfect visit that was manually linked". Please provide any communication responses you may have from your PS Vendor related to this matter.

HHSC Reason Codes are updated on an as needed basis. The current version of the HHSC Reason Codes can be found at this link - <https://www.tmhp.com/sites/default/files/file-library/evv/evv-proprietary-systems/hhsc-evv-business-rules-proprietary-systems-2/Appendix A EVV Reason Codes Effective Aug 1 2023.pdf>. The current reason codes became effective on August 1, 2023.

Question: Can you explain again what a Legacy Visit is?

Response: A Legacy EVV Visit Transaction is a visit transaction that was recorded in a Program Provider or FMSA's previous EVV System.

Question: My understanding from previous meetings is that an agency/provider can use alternative devices. How will this be determined?

Response: Beginning September 1, 2025, HHSC is reducing the number of visit transactions that may be made using an alternative device. The reduction will occur over three fiscal years. From September 1, 2028, going forward, only 5% of a program provider's, FMSA's, CDS employer's or PSO's visit transactions may be made using an alternative device. The allowable percent of visit transactions made using an alternative device are:

Fiscal Year	Begin Date	End Date	Allowable percent of EVV transactions made using an alternative device
2026	9/1/2025	8/31/2026	75%
2027	9/1/2026	8/31/2027	50%
2028	9/1/2027	8/31/2028	25%
2029	9/1/2028	Forward	5%

HHSC is developing the compliance requirements and will publish them as soon as they are finalized.

Question: We submitted the PS Request Form through the TMHP Portal and received a confirmation number. Will I also receive an email from TMHP confirming the PS Request Form submission?

Response: Please contact EVV_PSO@tmhp.com with detailed information for questions regarding the PS Request Form status.

Question: What are the rules if services are provided outside the home and is there a limit to usage?

Response: There is not enough information provided to answer this question. Please send a detailed question to the HHSC PSO Team at evvpso@hhs.texas.gov. Please provide specific details to include: PSO NPI, PS Vendor Name, your contact information, email, phone #, type of services or Program provided, Payer of Services, Authorization issued by what agency, are services outside of home authorized, location of services outside of home, and any addition information available to help understand your question.

Question: How will we be able to monitor our compliance scores before the quarter ends to ensure best practices are being followed and improvements are made where needed?



Response: You can access your EVV Usage Report in the EVV Portal to see your EVV Usage Score for a selected month or quarter.

Question: Is attendance at this meeting mandatory?

Response: Attendance to this meeting is not mandatory. The goal for this workgroup meeting is to provide operational update information for PSOs and PS Vendors related to EVV as it relates to PSOs.