



# EVV Active Proprietary System Operator Workgroup Minutes

|                              |                                                                                                                                                                                   |
|------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Date</b>                  | July. 16th, 2026                                                                                                                                                                  |
| <b>Time Duration</b>         | 9:30 A.M. CST to 11:00 A.M. CST                                                                                                                                                   |
| <b>Webinar Link Location</b> | <a href="https://attendee.gotowebinar.com/register/5393137971551710813">https://attendee.gotowebinar.com/register/5393137971551710813</a><br>Webinar Only                         |
| <b>Contact</b>               | For questions related to this meeting, please contact:<br><a href="mailto:EVV_PSO@tmhp.com">EVV_PSO@tmhp.com</a> / <a href="mailto:EVVPSO@hhs.texas.gov">EVVPSO@hhs.texas.gov</a> |

## Attendees/Invitees

HHSC

TMHP

PS Vendors

Alayacare Cloud

Arrow by AlayaCare

Axxess Homecare

CareSnap

ContinuLink

DataLogic

Direct Care Innovations (DCI)

Emcentrix

InMyTeam

Kantime

Maxim

Pediconnect

Penni

Raintree Systems Inc.

Statewise

Valware

Visit Verify

### EVV Active PSO Workgroup

Thu, Jul 16, 2026 09:06 am CDT

Registrants **576**

Attendees **229**

Attendance Rate **40%**

Note: The agenda is subject to change.

## 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](mailto:evv_pso@tmhp.com) and HHSC EVV PSO at [evvpso@hhs.texas.gov](mailto:evvpso@hhs.texas.gov).

## Agenda

### 1. Welcome/Introductions

Presenter: Janna Plummer, 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.
- Due to our hard limit of 1,000 registrants for the webinar, please do not share or forward this invite or registration link with anyone that is not on the Active PSO Workgroup distribution list. Participation is limited to 2 members per organization. To include additional staff, team members may join the webinar together using one connected call. If you need to make changes to your organizations registered participants, please send an email to [EVV\\_PSO@tmhp.com](mailto:EVV_PSO@tmhp.com).

#### 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; if there are any questions related to this topic, they are addressed under Topic 19 in the Q&A section of the Minutes.

### 2. Action Items Review from Prior Meeting

Note: The agenda is subject to change.

Presenter: Janna Plummer, TMHP EVV PSO Operations

Duration: 2 minutes

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

**Minutes:**

Topic presented; if there are any questions related to this topic, they are addressed under Topic 19 in the Q&A section of the Minutes.

### **3. General Update – News from webpage related to PSOs**

Presenter: Janna Plummer, TMHP EVV PSO Operations

Duration: 5 minutes

- **June 2026**
  - [New IAMOnline User Guide Now Available](#) - 6/05/2026
  - [PEMS and PA on the Portal Training Materials Now Include TMHP IAMOnline Details for Transition Release 1 Effective June 12, 2026](#) - 6/12/2026
  - [Updated TMHP My Account User Guide Now Available](#) - 6/12/2026
  - [System Maintenance Outages Scheduled in July, August, and October of 2026](#) - 6/15/2026
  - [Reminder: TMHP EDI Connectivity Change Scheduled for August 2026](#) - 6/26/2026

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:**

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### **4. Changes to TMHP IAMOnline Login for Texas Medicaid Providers**

Presenter: Dan Kellogg, HHSC Deputy Chief Information Officer for Infrastructure

Duration: 10 minutes

- Presentation
- Questions

**Minutes:**

Topic presented; if there are any questions related to this topic, they are addressed under Topic 19 in the Q&A section of the Minutes.

## 5. Managed Care (MCO) Updates Impacting PSOs

Presenter: Rae Harris, HHSC EVV Operations

Duration: 5 minutes

- [Options for Medicare and Medicaid Dual Coverage | Texas Health and Human Services](#)
  - Integrated D-SNPs Began Operating on Jan. 1, 2026:
    - Bexar County (Molina Health Plan)
    - Dallas County (Molina Health Plan, Superior Health Plan)
    - El Paso County (Molina Health Plan)
    - Harris County (Molina Health Plan, United Healthcare)
    - Hidalgo County (Molina Health Plan, Superior Health Plan)
- Use [Appendix XXIX, STAR+PLUS Plan Codes and Contract Numbers | Texas Health and Human Services](#) to identify the STAR+PLUS MCO Plan code
- Phase II (approx. Jan. 1, 2027)
- Questions

Materials and Resources

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

### Minutes:

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## 6. Compliance Updates and Reminders

Presenter: Greeshma Somarajan, TMHP EVV PSO Operations

Duration: 5 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 as noted on the PSO Certification Form that is signed by the Signature Authority. 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 from June of 2026



| Rejection Code | Rejection Description                                                                                                | % of Top 10 |
|----------------|----------------------------------------------------------------------------------------------------------------------|-------------|
| Ex00031C       | The Member's Payer on the EVV visit does not match our records for this Member.                                      | 47.97%      |
| Ex0007C2       | Member on the EVV visit is not authorized for this Provider Number on this visit date in our records.                | 18.67%      |
| Ex00043C       | The plan code on the visit is not associated with the Member's Payer.                                                | 16.47%      |
| Ex00057C3      | The Member on the EVV visit is not authorized for this service group/service code on this visit date in our records. | 7.20%       |
| Ex00034C2      | The Member Medicaid ID on the EVV visit does not have active Medicaid eligibility for the visit date.                | 6.79%       |
| Ex0007C1       | The Provider Number on the EVV visit is not associated with this provider NPI/API for the Visit Date.                | 1.09%       |
| Ex00028B       | CDS Employer EVV ID is required when service is CDS service.                                                         | 0.86%       |
| Ex0002C        | Provider NPI cannot be validated as active for the visit date.                                                       | 0.55%       |
| Ex00034C1      | The Member Medicaid ID on the EVV visit is not found in our records.                                                 | 0.26%       |
| Ex00059C       | The EVV HCPCS Code and EVV Modifier combination on the EVV visit is not eligible for EVV.                            | 0.15%       |

- The impacted PSOs have been notified and are working with TMHP to correct the issues to remain in compliance with BRs and EVV policy.
- Please note that it is important to Program providers and FMSAs keep Signature Authority contact information current and accurate. If TMHP is unable to reach the Signature Authority regarding BR non-compliance issues, it may result in suspension of visit transmission to the aggregator. Per HHSC EVV policy, HHSC may cancel the provider's use of the EVV Proprietary System without offering an opportunity to correct the non-compliance.
- Program providers and FMSAs who verify and submit visits to the EVV Aggregator that reject, can cause a decrease in their EVV usage score possibly causing them to drop below the 80% threshold for compliance with EVV Usage.
- Questions

#### Materials and Resources

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

#### Minutes:

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## 7. EVV Compliance Metrics and Guidelines

Presenter: Tracie Teague, HHSC EVV Operations

Duration: 5 minutes

Note: The agenda is subject to change.

- No updates

**Minutes:**

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## 8. HHSC/AMD System Updates

Presenter: Hetal Desai, HHSC EVV Operations

Duration: 5 minutes

- No updates.

**Minutes:**

Topic presented; if there are any questions related to this topic, they are addressed under Topic 19 in the Q&A section of the Minutes.

## 9. Business Rule Updates

Presenter: Sam Darby, HHSC EVV Operations

Duration: 15 minutes

- EVV Business Rules for Proprietary Systems, v4.0
  - Review of upcoming changes.
  - Targeted publication date for this revision is late August 2026.
  - Compliance for operational PSOs:
    - New certification form.
    - Each PSO will receive a new customized certification form from TMHP following the publication of the Business Rules.
    - PSOs will need to sign and return the certification form by the specified due date.
    - Certification form re-submissions for PSOs will be in late 2026 to early 2027. More information on specific dates will be provided later.
- Questions

**Materials and Resources**

1. [TMHP PSO Business Rules Webpage](#)
2. [Presentation – Review of Upcoming PS Business Rule Changes](#)
3. HHSC EVV PSO Mailbox ([EVVPSO@hhs.texas.gov](mailto:EVVPSO@hhs.texas.gov))

**Minutes:**

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## 10. PSO Operational Updates

Presenter: Erin Grosser, TMHP EVV PSO Operations  
Duration: 5 minutes

### Important Information

- [System Maintenance Outage Scheduled for July, August, and October of 2026 – 6/15/2026](#)
- <https://www.tmhp.com/news/2026-07-06-updates-electronic-visit-verification-personal-care-services-bill-codes-table>
- [Electronic Visit Verification Claims Matching—Attention Financial Management Services Agencies and Consumer Directed Services Employers—Additional Services Added Requiring an EVV Visit | TMHP](#)
- Questions

### Materials and Resources

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

### Minutes:

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## 11. Geo-Location Tips

Presenter: Janna Plummer, TMHP EVV PSO Operations  
Duration: 5 minutes

Below we have some helpful tips for providers to capture accurate geo-location when using the mobile method.

- Contact your EVV Proprietary System vendor for instructions on how to correct geolocation errors in Member profiles.
- Document the situation to include all steps you have taken to correct the incorrect location being provided by the Service Providers Mobile device, for the case manager and your records.
- Use Reason Code 310E, Incorrect service delivery location, when completing visit maintenance. You may choose to use the free text field in 310E for documentation purposes even though it isn't required.
- Instruct service providers to turn on geolocation services on their phone or other mobile device prior to clocking in and clocking out so accurate geolocation can be captured.
- Coordinate with the Service Provider to work with Mobile Phone Service Carrier to see if Carrier can improve the geolocation function for the particular mobile device model.

### Minutes:

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## 12. Training Updates

Presenter: Trenice Brown, HHSC EVV Training Specialist

Duration: 10 minutes

- Program Providers and FMSAs approved as PSOs are required to take the following trainings annually:
  - **EVV Policy Training:** provided by HHSC or your managed care organization (MCO). EVV Policy training facilitated by HHSC can be found in the [HHS Learning Portal](#) (EVV Policy Training for Program Providers and FMSAs course and EVV Policy Training-Webinar Recordings).
    - **Note:** EVV Policy Training can also be obtained through our annual EVV Policy Training webinars held typically in the fall.
  - **EVV Portal Training:** provided by TMHP through the [TMHP Learning Management System](#) (or LMS)
  - **EVV System Training:** provided by the EVV proprietary system vendor, PSO, or an entity on behalf of the PSO
- Program providers approved as PSOs are required to provide clock in and clock out methods training to service providers.
- Optional Training for Non-Compliance
  - **EVV Compliance Training:** If additional EVV Policy Training is requested by your payer due to non-compliance, you may now take the EVV Compliance Course provided by HHSC through the [HHS Learning Portal](#).
- [EVV Visit Transaction Rejection Guide](#)
  - TMHP recently updated this guide on the TMHP EVV Training webpage.
  - Refer to this guide to help you resolve EVV visit transaction rejections.
- Materials
  - [EVV Training Requirements Checklist \(PDF\)](#)
  - [HHS Learning Portal](#)
  - [TMHP Learning Management System](#)
  - [EVV Visit Transaction Rejection Guide](#)
- Questions

### Minutes:

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### 13. 2026 Operational Readiness Review (ORR) Status Update

Presenter: Erin Grosser, TMHP EVV PSO Operations

Duration: 5 minutes

- PSO Onboarding Sessions
  - All 2026 Sessions are posted on the [TMHP EVV Proprietary System webpage](#).

#### Upcoming ORR Sessions

| Session                  | Planning Meeting Date | ORR Start Date | Session Approval Date | Earliest Go-Live Date |
|--------------------------|-----------------------|----------------|-----------------------|-----------------------|
| <b>2026-3: Expedited</b> | Jul. 20, 2026         | Jul. 27, 2026  | Aug. 25, 2026         | Oct. 1, 2026          |
| <b>2026-4: Standard</b>  | Sept. 14, 2026        | Sept. 28, 2026 | Nov. 11, 2026         | Dec. 15, 2026         |
| <b>2026-5: Expedited</b> | Nov. 30, 2026         | Dec. 7, 2026   | Jan. 11, 2027         | Feb. 15, 2027         |

- As of 7/6/2026, there are 1015 operational PSOs and 17 operational PS Vendors.
- The updated [Approved EVV Proprietary Systems](#) is published on the TMHP EVV Proprietary Systems webpage and has been updated to include any new PS Vendors or changes on 6/15/2026.
  - 14 approved proprietary systems.
  - Updated and published on 6/15/2026.
- Questions

#### Materials and Resources

1. [TMHP EVV Webpage - EVV Proprietary Systems](#)
2. [EVV Proprietary Systems Approved by HHSC \(PDF\)](#)
3. TMHP PSO Mailbox: [evv\\_pso@tmhp.com](mailto:evv_pso@tmhp.com)

#### Minutes:

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### 14. EVV Policy and Texas Administrative Code (TAC) Rules

Presenter: Sarah Hambrick, HHSC EVV Operations

Duration: 10 minutes

- Texas Administrative Code Amendments
  - Adoption effective late summer 2026
  - Sign up for Rules Coordination Office and Electronic Visit Verification (EVV) GovDelivery notices.

Note: The agenda is subject to change.

- Questions

#### Materials and Resources

1. [HHSC EVV webpage](#)
2. [HHSC EVV Policy Handbook](#).
3. [HHSC EVV Texas Administrative Code](#).

#### Minutes:

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### 15. Review Future Meeting Dates

Presenter: Janna Plummer, TMHP EVV PSO Operations

Duration: 3 minutes

- Future Meeting Dates:
  - September 17, 2026 – 9:30 am – 11:00 am CST
  - November 19, 2026 – 9:30 am – 11:00 am CST

### 16. Review Action Items

Presenter: Janna Plummer, TMHP EVV PSO Operations

Duration: 2 minutes

- Outstanding action items
- New action items

### 17. Discussion on Future Agenda Items

Presenter: Janna Plummer, 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.

### 18. Adjournment

Presenter: Janna Plummer, TMHP EVV PSO Operations

Duration: 1 minute

## 19. Questions Received during Workgroup

**Question 1:** Did the recent data breaches (90gb from a GitHub project) that Accenture disclosed involve any of TMHP's data?

**Answer 1:** The investigation is complete and we have no evidence that client business data was impacted. Based on our thorough investigation of the incident we know the extent of the issue was a misconfigured tool that allowed access to a single repository that consisted primarily of webpages used to organize and deliver internal Accenture learning and training. We can say with confidence that there was no impact on client data or systems.

**Question 2:** Currently, our IAMOnline account is created by manager. Our manager is willing to share username and password to one staff, but it is inconvenient whenever logging in, staff has to ask manager the verification code. Is that possible to create authorization user per agency?

**Answer 2:** Yes, every user needs their own account due to the multi-factor authentication requirement. This is also due to audit tracking. Admins can add users to their NPI and setup accounts for them.

**Question 3:** Are the MESav now under IAMOnline?

**Answer 3:** Yes, MESAV is now available on IAMOnline as of 07/10/2026.

**Question 4:** Are we able to check eligibility for clients on TMHP IAMOnline?

**Answer 4:** Yes, eligibility is now available on IAMOnline as of 07/10/2026.

**Question 5:** Do we need to set up access to all employees for I am online individually?

**Answer 5:** Yes, every user needs their own account due to the multi-factor authentication requirement. This is also due to audit tracking. Admins can add users to their NPI and setup accounts for them.

**Question 6:** Is the go live date for 2026-3 on Nov 1st or Oct 1st? On [TMHP.com](https://www.tmhp.com) it says Oct 1st.

**Answer 6:** The correct Go-Live date is Oct 1st. As a reminder, please check the TMHP EVV Proprietary Systems webpage for current PSO onboarding requirements and current operational readiness review (ORR) schedules.



**Question 7:** When logging in on TMHP it always asks for a code to log in is there any way we can skip that step?

**Answer 7:** The code must be entered to complete the multi-factor authentication requirement.

**Question 8:** The IAMOnline keeps do reverification while we are in the middle of billing a claim and we lose our work. Can the time be extended?

**Answer 8:** The time cannot be extended as the idle time out is security control. Users should make sure not to have any tabs open they are not actively using. When those tabs time out, it will log the user out of the entire application.

**Question 9:** If we have two TMHP accounts, one with acute care and long-term care. If it's merged. Which one will logon to IAMOnline?

**Answer 9:** Both accounts and the single account would still use TMHP IAMOnline to login. The ability to see and use TexMedConnect Acute Care or Long-Term Care is dependent on the permissions the user has.

**Question 10:** Just to clarify, we need to pull MESavs and eligibility through IAMOnline?

**Answer 10:** Yes, MESAV and Eligibility is available through your TMHP IAMOnline.

**Question 11:** We are having an issue with our TMHP login original username and Password, was that going to transition?

**Answer 11:** For support and assistance with issues you are experiencing using your TMHP login. Please contact our EDI Help Desk Team by calling 888-863-3638, they are available Monday-Friday from 7am-7pm CST.

**Question 12:** Can admin create a secondary email for usage of TMHP for employees?

**Answer 12:** The user's email address needs to be established first. Once that is done, the admin can create a new user in My Account, indicate their email address, link them to the NPI they want them to have access to, and set the permissions that person should have for that NPI.

**Question 13:** For IAMOnline, for multiple NPI's, is it one user or do we need a user per NPI?

**Answer 13:** A single user can do work for multiple NPIs. It is all in how the admin of that NPI sets the permissions for that user.

**Question 14:** Why do the platforms look different?

**Answer 14:** TMHP IAMOnline and HHS IAMOnline serve two different user demographics with some overlap.

**Question 15:** Is there another way to contact the EDI helpdesk? It is always busy and I need to talk to someone about missing 835's for one contract.

**Answer 15:** The EDI Help Desk is the team that can aid with the reset of missing 835 reports. Please contact our EDI Help Desk Team by calling 888-863-3638, they are available Monday-Friday from 7am-7pm CST. You can also contact provider relations for additional support by emailing [provider.relations@tmhp.com](mailto:provider.relations@tmhp.com).

**Question 16:** When we log into My Account how do we navigate to where we can check our email?

**Answer 16:** If a user wants to see which email address their My Account is tied to, once logged in click on My Profile in the Account Setting section on the main screen.

**Account Settings**

[My Profile](#)

Modify your profile information.

[Change Password](#)

Change your account password. It is recommended that you do this every 30 days.

[Provider Administrator Lookup](#)

Identify the account administrator for your provider identifiers.

**Question 17:** I tried logging in to TMHP but I used my PW and username, and I downloaded the application OKTA VERIFY but it doesn't send me the code to me it send it to the administer.

**Answer 17:** This email address does not exist in TMHP IAMOnline nor does part of their name. From a security standpoint, I advise the administrator to call the EDI Help Desk for guidance.

**Question 18:** Can MESavs and eligibility still be pulled on TMHP instead?

**Answer 18:** MESAV and Eligibility is available through your TMHP IAMOnline.

**Question 19:** When we call 888-863-3638, we get all are busy and say to call back later and hangs.



**Answer 19:** The EDI Help Desk is experiencing a high call volume right now.

**Question 20:** The code is being sent to the administrator, and not to my OKTA application.

**Answer 20:** This email address does not exist in TMHP IAMOnline nor is it part of their name. From a security standpoint, I advise the administrator to call the EDI Help Desk for guidance.

**Question 21:** Will TMHP still offer tutorials for IAMOnline?

**Answer 21:** Yes, a video has been created and posted on TMHP.com for TMHP IAMOnline → <https://youtube.com/playlist?list=PLNuX1ZyjS5tI&si=p-qzpeTAAY--0W-A>

**Question 22:** Why does the IAMOnline log us out mid typing a claim actively with 1 window but it still times out. Should it be logging us out even when we are not idle for our 1 window?

**Answer 22:** The time cannot be extended as the idle time out is security control. Users should make sure not to have any tabs open they are not actively using. When those tabs time out, it will log the user out of the entire application. Typing on a page is not seen as being active.