

EVV Active Proprietary System Operator Workgroup Minutes

Date	November 20th, 2024
Time Duration	1:00 P.M. CST to 2:30 P.M. CST
Webinar Link	https://register.gotowebinar.com/register/5640212514627398488
Location	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, Nov 20, 2024 12:30 pm CST	
Registrants	774
Attendees	404
Attendance Rate	52%

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 the previous workgroup.
- 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](#)

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

3. General Update – News from webpage related to PSOs

Presenter: Lauren Poston, TMHP EVV PSO Operations

Duration: 5 minutes

- **July 2024**
 - [EVV Active PSO Workgroup Information Now Available on TMHP's EVV Proprietary Systems Web Page](#)- 07/08/2024
- **August 2024**
 - [Reminder: EVV Compliance Grace Period for PCS and HHCS](#)- 08/02/2024
 - [New STAR+PLUS Contracts Beginning September 1, 2024](#)- 08/07/2024
 - [EVV Billing In-Home vs. Out-of-Home For HCS and TxHmL Home Health Care Services \(HHCS\)](#)- 08/22/2024
 - [Reminder: STAR+PLUS Contracts Beginning Sept. 1, 2024](#)-08/29/2024
- **September 2024**
 - [URGENT: EVV Impacts due to the New STAR+PLUS MCO Contracts Beginning Sept. 1, 2024](#)- 09/03/2024



- [HHSC Phishing Alert for EVV Proprietary System Operators](#)- 09/05/2024
- **October 2024**
 - [Annual EVV Policy Training Webinar for Program Providers and FMSAs](#)- 10/14/2024
 - [EVV System Daylight Savings Time Change](#)- 10/24/2024
 - [Extended System Outage December 6-8, 2024](#)- 10/30/2024
- **November 2024**
 - [Dual Demonstration MMPs Pilot Program Discontinued in Select Service Areas Effective January 1, 2025](#)- 11/01/2024
 - [Register for the November 22 FMSA Quarterly Webinar](#)- 11/04/2024

Materials and Resources

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

4. Managed Care (MCO) Updates Impacting PSOs

Presenter: Rae Harris, HHSC EVV Operations
Duration: 5 minutes

- TMHP provided a notification to each PS Vendor on 11/04/2024 to inform them of the recently published News Article on the TMHP Webpage.
 - [Dual Demonstration MMPs Pilot Program Discontinued in Select Service Areas Effective January 1, 2025](#)- 11/01/2024

Materials and Resources

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

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 October 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.	52.03%
Ex00043C	The plan code on the visit is not associated with the Member's Payer.	26.22%
Ex0007C2	Member on the EVV visit is not authorized for this Provider Number on this visit date in our records.	8.49%
Ex00057C3	The Member on the EVV visit is not authorized for this service group/service code on this visit date in our records.	6.64%
Ex00034C2	The Member Medicaid ID on the EVV visit does not have active Medicaid eligibility for the visit date.	4.30%
Ex0007C1	The Provider Number on the EVV visit is not associated with this provider NPI/API for the Visit Date.	1.00%
Ex0002C1	Provider NPI is not active for this EVV System on the date of service.	0.50%
Ex00034C1	The Member Medicaid ID on the EVV visit is not found in our records.	0.35%
Ex00030B	The CDS Employer Last Name on the EVV visit is required if CDS Employer EVV ID is populated.	0.23%
Ex00029B	The CDS Employer First Name on the EVV visit is required if CDS Employer EVV ID is populated.	0.23%

- 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](#)

6. HHSC/AMD System Updates

Presenter: Yvette Walters, HHSC EVV Operations
 Duration: 5 minutes

- No updates
- Questions

Materials and Resources

- 1.

7. Business Rule Updates

Presenter: Sam Darby, HHSC EVV Operations
 Duration: 5 minutes

- Updated Waiver Criteria for Legacy Visit Import Process
 - HHSC published new waiver criteria for Business Rules associated with the Legacy Visit Import Process.
 - If a PSO meets either of these criteria, the Legacy Visit Import Process (and the Session V ORR) may be waived:
 - The PSO has never used another HHSC-approved EVV System; or,

- The PSO has been with their current EVV System continuously since March 12, 2023.
- Questions

Materials and Resources

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

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) - Visit Maintenance (VM) Process for Proprietary Systems Testing and ORR
- 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.
- Questions

Materials and Resources

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

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 11/20/2024, there are 880 operational PSOs and 11 approved PS Vendors.
 - 2024 Sessions:
 - Session 3- Standard completed on 7/18/2024.
 - 3 Providers will go live as PSOs on 3/31/2025.
 - Session 4- Expedited completion is planned on 9/24/2024.
 - 242 Providers began Go-Live on 11/1/2024.
 - 2025 Sessions:
 - Session 1- Standard will begin on Jan. 21, 2025, and invitations have been provided to those providers.
- 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 9/9/2024.
- 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

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

Presenter: Sarah Hambrick, HHSC EVV Operations

Duration: 5 minutes

- Alternative Device Reduction
 - HHSC will be reducing the use of alternative devices as an approved method to clock in and clock out.
 - Will occur in phases over four years.



- Effective September 1, 2028, program providers and FMSAs, including those approved as a PSO, and CDS employers must restrict the use of alternative devices for visit transactions to 5% of their total visit transactions.
- HHSC will publish full policies at a future date.

Fiscal Year	Begin Date	End Date	Allowable percent of EVV transactions
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%

- 89th Legislative Session
 - Session begins January 14, 2025 (1st day).
- Questions

Materials and Resources

1. [HHSC EVV webpage](#)

11. Review Future Meeting Dates

Presenter: Jesse Riordan, TMHP EVV PSO Operations

Duration: 3 minutes

- Future Meeting Dates:
 - January 29, 2025 – 1:00 pm – 2:30 pm CST
 - 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

12. Review Action Items

Presenter: Jesse Riordan, TMHP EVV PSO Operations

Duration: 2 minutes

- Outstanding action items
- New action items

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.

14. Questions Received during Workgroup

Question: Is Superior staying within Hidalgo County?

Response: Yes, Superior is staying in Hidalgo County. Only the plans listed in the notice are ending 12/31/2024.

Question: What is web services?

Response: Webservice is API Services to check authorization live with TMHP data. There are various different type of webservices by at the end they check and validate data such as, Auth., Payers, and plan codes.

Question: Please where do we get the CFC HAB for Superior billing. Superior don't provide the modifier for any of their clients and it's been difficult for us to find the right billing code and modifier.

Response: The HCPCS and modifiers for EVV required services are available on the EVV website: [Electronic Visit Verification \(EVV\) | Texas Health and Human Services](#). Scroll down to "Service Bill Code Table. There are two tables, one for personal care services and one for home health care services.

Question: For Medicaid eligibility -- does the TMHP website have the LATEST eligibility data, including for members from MCOs?

Response: Please refer to the Eligibility Web Services for this information.

<https://www.tmhp.com/sites/default/files/file-library/evv/evv-proprietary-systems/hhsc-evv-business-rules-proprietary-systems-2/Appendix D EVV Master Provider Web Service V4.0.pdf>

Question: I don't understand what API means, where do we find this "web services".

Response: Please find more information about Web Services at the following links.

<https://www.tmhp.com/topics/evv/evv-proprietary-systems/rules>

<https://www.tmhp.com/sites/default/files/file-library/evv/evv-proprietary-systems/hhsc-evv-business-rules-proprietary-systems-2/Appendix D EVV Master Provider Web Service V4.0.pdf>

[https://www.tmhp.com/sites/default/files/file-library/evv/evv-proprietary-systems/hhsc-
evv-business-rules-proprietary-systems-
2/Appendix F EVV Prior Authorization File V4.0.pdf](https://www.tmhp.com/sites/default/files/file-library/evv/evv-proprietary-systems/hhsc-
evv-business-rules-proprietary-systems-
2/Appendix F EVV Prior Authorization File V4.0.pdf)

[https://www.tmhp.com/sites/default/files/file-library/evv/evv-proprietary-systems/hhsc-
evv-business-rules-proprietary-systems-
2/Appendix L Payer Plan Code Web Service V4.0.pdf](https://www.tmhp.com/sites/default/files/file-library/evv/evv-proprietary-systems/hhsc-
evv-business-rules-proprietary-systems-
2/Appendix L Payer Plan Code Web Service V4.0.pdf)

Question: We have received this code, and sometimes the information is out of date.

Response: Please confirm the code you received. You may send details to TMHP's PSO mailbox, EVV_PSO@tmhp.com.

Question: What does Legacy Visit mean, and why is the Legacy Visit Import Process in place -- in what situations would an agency need to import legacy visits?

Response: Legacy Visits refer to EVV Visit Transactions that were recorded in a PSO's prior EVV System and are accepted by the EVV Aggregator. PSOs may not have access to their prior EVV System and thus must import the Legacy Visits into their current EVV System for visit maintenance purposes. PSOs must submit a Visit Maintenance Unlock Request to their payer in order import the Legacy Visits into their current EVV System.

Question: What about visits that did not occur in the previous EVV system because the client enrollment was not completed priority to our go live date for the PSO. Once the client was enrolled the visits for the dates prior to our go live date were entered into the PSO, but the aggregator denied them saying prior to go live date. How should these visits be handled. We are now over a year waiting on processing these visits.

Response: HHSC updated EVV Aggregator edits Ex0002C1, Ex0003C3, and Ex000111C to allow for manual visits with a date of service prior to a PSO's go live date to be entered into the PSO's current EVV System. If these visits were already entered into your current EVV System, a Visit Maintenance Unlock Request is required to be submitted to your payer to re-export these visits to the EVV Aggregator. As the date of service is prior to the EVV Aggregator, VMURs for these visit transactions are on hold. PSOs may begin to submit VMURs for these dates of service when the VMUR hold is lifted in January 2025.

Question: When will FMSA's who use PSO's be able to send VMURs (visit maintenance unlock requests) to payers?

Response: Providers and FMSAs that are PSOs will be able to begin submitting Legacy Visit VMUR in January 2025 after the Session V compliance testing has been completed in December 2024.

Question: I been on the PSO for over a year now do i need to renew my PSO with TMHP.

Response: A new PSO Request Form must be submitted if any changes or updates are needed for your agency. Request Form submission does not expire.

Question: Hi, if vendors have any questions on the new changes to the files submitted for Visits, what email address should they reach out to

Response: HHSC PSO – evvpso@hhs.texas.gov and TMHP PSO – evv_pso@tmhp.com

Question: In an effort to have our attendants transition to mobile option only it has been a huge challenge, what happens if we cannot meet the allowable percentage by the time frames?

Response: HHSC is creating the Alternative Device Compliance Policies. Once complete we will publish them as a standalone policy document, then will add to the EVV policy handbook as soon as possible after that date.

Question: Will the transactions volume for the new Alternative Device policy be per NPI, EIN, or Contract?

Response: HHSC is creating the Alternative Device Compliance Policies. Once complete we will publish them as a standalone policy document, then will add to the EVV policy handbook as soon as possible after that date.

Question: Will that be 5% per EVV account or per vendor contract?

Response: HHSC is creating the Alternative Device Compliance Policies. Once complete we will publish them as a standalone policy document, then will add to the EVV policy handbook as soon as possible after that date.

Question: Transactions are what exactly? for instance would a client with a token who has lots of shifts be weighted more than a client using the app?

Response: EVV transactions are EVV Visit Transactions. Each EVV Visit is considered one EVV visit transaction. For example, if you have 100 visit transactions total and 10 of them are AD, it doesn't matter which client(s) the visit transactions are from. HHSC is working on determining how compliance will be monitored for the Alternative Device reduction.

Question: When you say EVV transactions we are not talking about clients correct? If a client has multiple attendants that clock in and out 4 times a day that would count as 4 transactions?

Response: A visit transaction is a clock in or clock out. So, yes, if a member has multiple service providers that clock in and clock out a total of 4 times that would be 4 transactions.

Question: Question on alt device phase out -- what is latest guidance on how compliance will be tracked? Will there be a report to help us calculate % of transactions?

Response: The plan is to create report and have it available on the EVV Portal. In the interim, you may use the following criteria to get an idea of where your program provider agency or FMSA stands when it comes to usage of alternative devices to record your EVV visits: Divide your total Alternative Device Visits by your Total Visits (Inclusive of alternative device, mobile app, landline, and manually entered visits). You can leverage the data on the EVV Service Provider Clock In and Clock Out Report located in the EVV Portal to determine your percentage by NPI or fee-for-service contract number. Reviews for alternative device usage will be conducted on a quarterly basis.

Question: 5% of total EVV Transactions allowed, is this by quarter?

Response: HHSC is creating the Alternative Device Compliance Policies. Once complete we will publish them as a standalone policy document, then will add to the EVV policy handbook as soon as possible after that date.

Question: Correct me if I'm wrong. From my understanding is by 8/31/2026 has to be at 75 percent or has to be on 9/1/2025. Is that we have 1 year to get it down to 75 percent.

Response: The allowable percent of EVV transactions using alternative devices is 75% or less beginning 9/1/2025.

Question: Where can we find how many transactions we have and is it based on a daily average or weekly average?

Response: HHSC is developing a report specifically for identifying the percentage of EVV Visit Transactions that are recorded with an Alternative Device. There is the EVV Service Provider Clock In and Clock Out report, which will identify the number of visit transactions by Clock In/Clock Out method and by Service Provider.

Question: What about visits that did not occur in the previous EVV system because the client enrollment was not completed priority to our go live date for the PSO. Once the client was enrolled the visits for the dates prior to our go live date were entered into the PSO, but the aggregator denied them saying prior to go live date. How should these visits be handled. We are now over a year waiting on processing these visits.

Response: HHSC is developing a report specifically for identifying the percentage of EVV Visit Transactions that are recorded with an Alternative Device. There is the EVV Service Provider Clock In and Clock Out report, which will identify the number of visit transactions by Clock In/Clock Out method and by Service Provider.

Question: How can I get the report to see where I can see my percent?

Response: You may go to the EVV Portal under the "Reports" tab and select "EVV Usage Report". Fill out the required fields and you can export the report. For additional direction, please visit the TMHP Learning Management System (LMS) and review the EVV Portal Report job aids.

Question: Can caregivers still use the alternative device on the mobile app, for client in the remote areas?

Response: Confirm with your proprietary system vendor to see if this functionality is and will still be available in your EVV system.

Question: When provided later, can you also include the time-frame for the usage, such as daily percent, weekly percentage... this way when we run the report we'll know the date range to be looking at.

Response: This is part of the compliance policies.

Question: What is the penalty for not making the percentage?

Response: HHSC is creating the Alternative Device Compliance Policies. Once complete we will publish them as a standalone policy document, then will add to the EVV policy handbook as soon as possible after that date.

Question: Can the attendant use an iPad to clock in because some time their phone is too old to use the app?

Response: Service Providers may use another device such as a tablet to use the Mobile Method to clock in and clock out of the EVV System if the tablet is able to run the EVV Proprietary System's mobile application.

Question: Where on the EVV website can we find that evv service provider clock in/out report?

Response: The EVV Service Provider Clock In/Out report is available on the EVV Portal.

Question: What will happen if we have higher than the specified percentage for tokens? Will there be another alternative for those who cannot use the app or landline?

Response: The HHSC approved clock in and clock out methods will not change. The options will still be the mobile app, landline and alternative device.

Question: If we have multiple office locations is the percent based on office locations/contract numbers or the agency as a whole?

Response: HHSC is creating the Alternative Device Compliance Policies. Once complete we will publish them as a standalone policy document, then will add to the EVV policy handbook as soon as possible after that date.

Question: A few of our attendants are experiencing issues on the distance (more than 1320 ft) even if they are in the client's homes. Will they be paid? How would that affect our agency compliance rating?

Response: If the PSO determines that the Service Provider's GPS location captured via the Mobile Method is incorrect, and the Service Provider is at the Member's Home, the PSO should document the situation for the case manager and your records and use Reason Code 310E, Incorrect service delivery location, when completing visit maintenance. These visits may be exported to the EVV Aggregator and an EVV Claim may be submitted for that visit transaction. Exceptions for geo-location errors do not impact EVV Compliance if the clock in/clock out is linked to the visit transaction.

Question: What if an attendant is using IVR line using cell phone, do we still accept visit?

Response: A cell phone is not acceptable for use to clock in or clock out as a Landline method visit.

Question: What of Agency whose all members attendant uses only mobile App?

Response: If all of your service providers are using the mobile app to clock in and clock out then you are currently at 0% of your visit transactions are made with an alternative device.

Question: So for now, when you unlock the Vesta mobile app, it gives options of mobile or token, can they still select token and put in the numbers on the tokens on the Vesta app. Also how to do check EVV with GPS location on the TMHP Reports?

Response: Please contact Vesta to determine the functionality of their mobile app.

Question: How do we calculate the %?

Response: This is still in process, but initially, you may use the following criteria to get an idea of where your program provider agency or FMSA stands when it comes to usage of alternative devices to record your EVV visits: Divide your total Alternative Device Visits by your Total Visits (Inclusive of alternative device, mobile app, landline, and manually entered visits). You can leverage the data on the EVV Service Provider Clock In and Clock Out Report located in the EVV Portal to determine your percentage by NPI or fee-for-service contract number. Reviews for alternative device usage will be conducted on a quarterly basis.

Question: What is the expected deadline for releasing all the guidelines so that providers can be expecting it?

Response: We don't have an anticipated release date at this time.

Question: Do we have to create a tool for calculate the percentage?

Response: Yes, in the interim, you will need to calculate your alternative device usage for your NPI or fee-for-service contract by using the data in the EVV Service Provider Clock In and Clock Out Report located in the EVV Portal. You can calculate the percentage as follows: Divide your total Alternative Device Visits by your Total Visits (Inclusive of alternative device, mobile app, landline, and manually entered visits).