



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

Version: 4.1

## Standard Path Onboarding Process: Proprietary System Operator (PSO) Onboarding Process Overview and Timeline when requesting approval to use an EVV System that has not been previously approved by HHSC.

Program providers and financial management services agencies (FMSAs) will follow this process when choosing a system that is not on the list of EVV Proprietary Systems Approved by HHSC located on the [TMHP EVV Proprietary Systems website](#)

Task	Responsible Party	Due Date	Resources
1. Program provider or FMSA must access and review all PSO technical requirements, the HHSC EVV Policy Handbook, and the HHSC EVV Business Rules for Proprietary Systems.	Program provider or FMSA	Prior to the submission of the EVV Proprietary System Request Form	<ul style="list-style-type: none"> <li>• <a href="#">TMHP EVV Proprietary System Web Page</a></li> <li>• <a href="#">HHSC EVV Proprietary Systems Web Page</a></li> </ul>
2. Program provider or FMSA must complete and submit the EVV Proprietary System Request Form to TMHP by email	Program provider or FMSA	Anytime throughout the year.	<ul style="list-style-type: none"> <li>• Email to: <a href="mailto:EVV_PSO@tmhp.com">EVV_PSO@tmhp.com</a></li> </ul>
3. HHSC assigns the program provider or FMSA to a Standard Operational Readiness Review (ORR) session, which consists of a series of meetings and activities between the program provider or FMSA, HHSC and TMHP. TMHP informs the program provider or FMSA of the assignment by email.	HHSC, TMHP	45 business days prior to the assigned session.	<ul style="list-style-type: none"> <li>• After receipt of the completed EVV Proprietary System Request Form.</li> </ul>
4. Program provider or FMSA must confirm the Standard ORR session assignment by email to HHSC and TMHP.	Program provider or FMSA	5 business days after HHSC assignment email is sent to program provider or FMSA.	<ul style="list-style-type: none"> <li>• Email to: <a href="mailto:EVVPSO@hhs.texas.gov">EVVPSO@hhs.texas.gov</a></li> <li>• Email to: <a href="mailto:EVV_PSO@tmhp.com">EVV_PSO@tmhp.com</a></li> </ul>
5. Program provider or FMSA must successfully submit a test transaction to the TMHP testing environment to confirm TMHP EVV System Access and Connectivity.	Program provider or FMSA, TMHP	20 business days prior to the start of the assigned ORR session.	<ul style="list-style-type: none"> <li>• TMHP technical support as needed</li> <li>• TMHP to set up testing environment for program provider or FMSA</li> <li>• Program provider or FMSA to submit a test transaction to the TMHP EVV Aggregator testing environment.</li> <li>• <b>Note: As per the State's policy, TMHP sftp accounts must be accessed every 89 calendar days to remain active. Failure to submit a test transaction or access the system within the 90 days may result in your account being deactivated, and may cause a delay to re-establish connectivity and to complete the TPT testing phase of ORR.</b></li> </ul>

Task	Responsible Party	Due Date	Resources
6. Program provider or FMSA must attend an ORR Planning Meeting with HHSC and TMHP.	Program provider or FMSA, TMHP, HHSC	10 business days prior to the assigned ORR session.	<ul style="list-style-type: none"> <li>Review the EVV Proprietary System Request Form</li> <li>Confirm program provider or FMSA awareness of all technical requirements</li> <li>Review next steps with program provider or FMSA</li> <li>HHSC provides Certification Form to program provider or FMSA</li> </ul>
7. Program provider or FMSA must submit the signed HHSC Certification form by email to HHSC.	Program provider or FMSA	1 <sup>st</sup> day of ORR session.	<ul style="list-style-type: none"> <li>HHSC Certification Form</li> <li>Email to: <a href="mailto:EVVPSO@hhs.texas.gov">EVVPSO@hhs.texas.gov</a></li> <li>Email to: <a href="mailto:EVV_PSO@tmhp.com">EVV_PSO@tmhp.com</a></li> </ul>
8. Program provider or FMSA conducts ORR demonstrations with HHSC and TMHP as assigned.	Program provider or FMSA, TMHP, HHSC	1 <sup>st</sup> day of ORR session.	<ul style="list-style-type: none"> <li>Round 1 is 10 days (3 demos + 5 days of correction by program provider or FMSA)</li> <li>Round 2 is 8 days (2 demos + 5 days of correction by program provider or FMSA)</li> <li>Round 3 is 2 days (2 demos).</li> </ul>
9. Program provider or FMSA submits ORR documentation files to HHSC for review.	Program provider or FMSA, HHSC	1 <sup>st</sup> day of ORR session.	<ul style="list-style-type: none"> <li>Documentation reviews will take place throughout the 20 days for the rounds.</li> </ul>
10. Trading Partner Testing (TPT) files are due to TMHP.	Program provider or FMSA, TMHP	Due date assigned by TMHP during Step 6.	<ul style="list-style-type: none"> <li>Program provider or FMSA required to submit EVV Transaction files and inform TMHP of file submission by COB Wednesdays throughout the scheduled ORR</li> </ul>
11. TMHP informs program provider or FMSA via email of HHSC's rejection or approval to use a proprietary system to submit EVV visits to the TMHP Aggregator.	HHSC, TMHP	3 business days after completion of all components of the ORR.	<p>For rejection:</p> <ul style="list-style-type: none"> <li>Ask program provider or FMSA if they wish to be placed on a waiting list for a future session</li> </ul> <p>For approval:</p> <ul style="list-style-type: none"> <li>Program provider or FMSA is notified of their Approval Date and is required to establish a Go-Live date.</li> </ul>
12. Program provider or FMSA to confirm Go-Live Date	Program provider or FMSA	3 business days after approval notification.	<ul style="list-style-type: none"> <li>Confirm Go-Live date (Program provider or FMSA must go-live with new EVV system within 45-90 calendar days of HHSC Approval Date)</li> </ul>
13. TMHP informs PSO via email of HHSC's approval or rejection of the Go-Live Date	TMHP	3 business days after Go-Live Date received from PSO	<p>For approval:</p> <ul style="list-style-type: none"> <li>HHSC approval is documented in email</li> </ul> <p>For rejection:</p> <ul style="list-style-type: none"> <li>Explanation for rejection is provided with Go-Live Date options</li> <li>PSO will be directed to submit new Go-Live Date for HHSC and TMHP approval within 3 business days of rejection notification email</li> </ul>
14. HHSC mails PSO Approval or Denial Letter via certified mail and emails electronic attachment of the PSO Approval or Denial Letter	HHSC	3 business days after Go-Live Date received from PSO	<p>For approval:</p> <ul style="list-style-type: none"> <li>Transmit acceptance letter on HHSC letterhead to PSO's Signature Authority</li> </ul> <p>For rejection:</p> <ul style="list-style-type: none"> <li>Transmit rejection letter on HHSC letterhead to program provider or FMSA Signature Authority</li> </ul>

Task	Responsible Party	Due Date	Resources
15. Program provider or FMSA submits signed Termination Form to current EVV System vendor	Program provider or FMSA	45 calendar days before approved Go-Live Date	<ul style="list-style-type: none"> <li>• EVV vendor Termination Forms require a signed Termination Form to be received 45 calendar days before the HHSC approved Go-Live Date identified in Step 12.</li> </ul>
<b>16. Optional Go-Live Date extension request</b>	Program provider or FMSA	30 calendar days before the original approved Go-Live Date	<ul style="list-style-type: none"> <li>• If an approved PSO identifies the need for a Go-Live Date extension request, the PSO must submit the extension request to the current EVV System vendor, TMHP and HHSC 30 calendar days before the previously approved Go-Live Date.</li> <li>• If the extended Go-Live Date falls after the 90<sup>th</sup> day of the ORR selection period (see step 12), <b>HHSC will require the new Go-Live Date to fall within the 45-90 day selection timeframe of a later ORR session.</b></li> <li>• If an approved PSO elects to cancel a Go-Live Date without requesting an extension, the PSO must notify the current EVV System vendor, TMHP, and HHSC to halt the termination with the current vendor <b>10 business days prior to the approved Go-Live date to avoid a disruption in the ability to submit visits to the EVV Aggregator.</b></li> </ul>
17. PSO must perform Data Transfer from current EVV System to new EVV System (when applicable).	PSO	10 business days before their Go-Live Date.	<ul style="list-style-type: none"> <li>• TMHP provides support as necessary (if transferring from an EVV vendor system in the state vendor pool)</li> <li>• TMHP and PSO will work with PSO's current EVV vendor (when applicable) for a Data Transfer plan</li> <li>• TMHP will provide approval to EVV Vendors to provide data transfer files to the PSO (when applicable).</li> </ul>
18. TMHP issues production credentials.	TMHP	10 business days before their Go-Live date.	<ul style="list-style-type: none"> <li>• TMHP sets up security access, and PSO system information in the EVV Aggregator in production</li> <li>• TMHP securely shares production security credentials with PSO</li> </ul>
19. TMHP and HHSC verify production system operation.	TMHP, HHSC	Go-Live plus up to 30 business days.	<ul style="list-style-type: none"> <li>• TMHP and HHSC monitor through internal metrics</li> <li>• HHSC updates the list of EVV Proprietary Systems Approved by HHSC (if applicable)</li> <li>• HHSC updates the EVV Proprietary System Access and Training Guide</li> </ul>

## Expedited Path Onboarding Process (Expedited Process): PSO Onboarding Process Overview and Timeline when requesting approval to use an existing operational EVV System that HHSC has previously approved.

Program providers and FMSAs will follow this process when choosing an approved Proprietary System from the list of EVV Proprietary Systems Approved by HHSC. If there are system features requested by the program provider or FMSA other than those on the list of EVV Proprietary Systems Approved by HHSC, then HHSC may require the program provider or FMSA to conduct optional documentation or demonstration reviews as documented below. HHSC and TMHP will provide guidance regarding required steps within the Expedited Process based on analysis of the EVV Proprietary System Request Form submitted by the PSO.

Task	Responsible Party	Due Date	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	Prior to the submission of the EVV Proprietary System Request Form	<ul style="list-style-type: none"> <li>• <a href="#">TMHP EVV Proprietary System Web Page</a></li> <li>• <a href="#">HHSC EVV Proprietary Systems Web Page</a></li> </ul>
2. Program provider or FMSA must complete and submit EVV Proprietary System Request Form to TMHP by email.	Program provider or FMSA	Anytime throughout the year.	<ul style="list-style-type: none"> <li>• Email to: <a href="mailto:EVV_PSO@tmhp.com">EVV_PSO@tmhp.com</a></li> </ul>
3. HHSC assigns the program provider or FMSA to an Expedited ORR session, which consists of a series of meetings and activities between the program provider or FMSA, HHSC, and TMHP. TMHP informs the program provider or FMSA by email.	HHSC, TMHP	45 business days prior to the assigned session.	<ul style="list-style-type: none"> <li>• After receipt of the completed EVV Proprietary System Request Packet.</li> </ul>
4. Program provider or FMSA must confirm the assigned Expedited ORR Session.	Program provider or FMSA, TMHP	5 business days after HHSC ORR session assignment email is sent to program provider or FMSA.	<ul style="list-style-type: none"> <li>• Email to: <a href="mailto:EVVPSO@hhs.texas.gov">EVVPSO@hhs.texas.gov</a></li> <li>• Email to: <a href="mailto:EVV_PSO@tmhp.com">EVV_PSO@tmhp.com</a></li> </ul>
5. Program provider or FMSA must successfully submit a transaction to the TMHP testing environment to confirm the TMHP EVV System Access and Connectivity.	Program provider or FMSA, TMHP	20 business days prior to the start of the assigned ORR session.	<ul style="list-style-type: none"> <li>• TMHP technical support as needed</li> <li>• TMHP to set up testing environment for program provider or FMSA.</li> <li>• Program provider or FMSA to submit a test transaction to the TMHP EVV Aggregator testing environment.</li> <li>• <b>Note: As per the State's policy, TMHP sftp accounts must be accessed every 89 calendar days to remain active. Failure to submit a test transaction or access the system within the 90 days may result in your account being deactivated, and may cause a delay to re-establish connectivity and to</b></li> </ul>

Task	Responsible Party	Due Date	Resources
			<b>complete the TPT testing phase of the ORR.</b>
6. Program provider or FMSA must attend an ORR Planning Meeting with HHSC and TMHP.	Program provider or FMSA, TMHP, HHSC	10 business days prior to the assigned ORR session.	<ul style="list-style-type: none"> <li>Review the EVV Proprietary System Request Form</li> <li>Confirm program provider or FMSA awareness of all technical requirements</li> <li>Confirm selected EVV System and features to be used</li> <li>Review next steps with program provider or FMSA</li> <li>Provide HHSC Certification Form to program provider or FMSA</li> <li>Discuss Go-Live requirements and timeframes with the program provider or FMSA.</li> </ul>
7. Program provider or FMSA must submit the signed HHSC Certification form by email to HHSC.	Program provider or FMSA	1 <sup>st</sup> day of ORR session.	<ul style="list-style-type: none"> <li>HHSC Certification Form</li> <li>Email to: <a href="mailto:EVVPSO@hhs.texas.gov">EVVPSO@hhs.texas.gov</a></li> <li>Email to: <a href="mailto:EVV_PSO@tmhp.com">EVV_PSO@tmhp.com</a></li> </ul>
8. <b>Required Trading Partner Testing (TPT):</b> Program provider or FMSA must submit EVV Visit transactions to the EVV Aggregator test environment.	Program provider or FMSA	Due date assigned by TMHP during Step 5.	<ul style="list-style-type: none"> <li>The Expedited ORR schedule will be customized per program provider or FMSA.</li> <li>Program provider or FMSA required to submit EVV Visit Transaction files and inform TMHP of file submission by COB Wednesdays throughout the scheduled ORR.</li> <li>TMHP confirms successful processing of EVV visit transaction data.</li> </ul>
9. <b>Optional Demonstrations:</b> HHSC will determine if the program provider or FMSA must demonstrate features of the chosen system that HHSC has not previously approved.	Program provider or FMSA, TMHP, HHSC	1 <sup>st</sup> day of ORR (if required)	<ul style="list-style-type: none"> <li>If required, HHSC will schedule demonstration review sessions at the beginning of the ORR process to expedite review and scoring of features.</li> </ul>
10. <b>Optional Documentation Review:</b> HHSC will determine if the program provider or FMSA must provide documentation for features of the chosen system that HHSC has not previously approved.	Program provider or FMSA, TMHP, HHSC	1 <sup>st</sup> day of ORR (if required)	<ul style="list-style-type: none"> <li>If required, the program provider or FMSA must submit documentation at the beginning of the ORR process to expedite review and scoring.</li> </ul>
11. TMHP informs program provider or FMSA via email of HHSC's rejection or approval to use a proprietary system to submit EVV visits to the TMHP Aggregator.	HHSC, TMHP	3 business days after completion of all components of the ORR.	<p>For rejection:</p> <ul style="list-style-type: none"> <li>Ask program provider or FMSA if they wish to be placed on a waiting list for a future session</li> </ul> <p>For approval:</p> <ul style="list-style-type: none"> <li>Program provider or FMSA is notified of their Approval Date and is required to establish a Go-Live date.</li> </ul>
12. Program provider or FMSA to confirm Go-Live Date	Program provider or FMSA	3 business days after ORR approval notification.	<ul style="list-style-type: none"> <li>Confirm Go-Live date (Program provider or FMSA must go-live with new EVV system within 45-90 calendar days of HHSC Approval Date)</li> </ul>

Task	Responsible Party	Due Date	Resources
13. TMHP informs PSO via email of HHSC's approval or rejection of the Go-Live Date	TMHP	3 business days after Go-Live Date received from PSO	For approval: <ul style="list-style-type: none"> <li>• HHSC approval is documented in email</li> </ul> For rejection: <ul style="list-style-type: none"> <li>• Explanation for rejection is provided with Go-Live Date options</li> <li>• PSO will be directed to submit new Go-Live Date for HHSC and TMHP consideration and approval within 3 business days of rejection notification email</li> </ul>
14. HHSC mails PSO Approval or Denial Letter via certified mail and emails electronic attachment of the PSO Approval or Denial Letter	HHSC	3 business days after Go-Live date received from PSO	For approval: <ul style="list-style-type: none"> <li>• Transmit acceptance letter on HHSC letterhead to PSO's FMSA's Signature Authority</li> </ul> For rejection: <ul style="list-style-type: none"> <li>• Transmit rejection letter on HHSC letterhead to program provider or FMSA Signature Authority</li> </ul>
15. Program provider or FMSA submits signed Termination Form to current EVV System vendor	Program provider or FMSA	45 calendar days before approved Go-Live Date	<ul style="list-style-type: none"> <li>• EVV vendor Termination Forms require a signed Termination Form to be received 45 calendar days before the HHSC approved Go-Live Date identified in Step 11.</li> </ul>
16. <b>Optional Go-Live Date extension request</b>	Program provider or FMSA	30 calendar days before the original approved Go-Live Date	<ul style="list-style-type: none"> <li>• If an approved PSO identifies the need for a Go-Live Date extension request, the PSO must submit the extension request to the current EVV System vendor, TMHP and HHSC 30 calendar days before the previously approved Go-Live Date.</li> <li>• If the extended Go-Live Date falls after the 90<sup>th</sup> day of the ORR selection period (see step 11), <b>HHSC will require the new Go-Live Date to fall within the 45-90 day selection timeframe of a later ORR session.</b></li> <li>• If an approved PSO elects to cancel a Go-Live Date without requesting an extension, the PSO must notify the current EVV System vendor, TMHP, and HHSC to halt the termination with the current vendor <b>10 business days prior to the approved Go-Live date to avoid a disruption in the ability to submit visits to the EVV Aggregator.</b></li> </ul>
17. PSO must perform Data Transfer from current EVV System to new EVV System (when applicable).	PSO	10 business days before their Go-Live Date.	<ul style="list-style-type: none"> <li>• TMHP provide support as necessary (if transferring from State Approved Vendor)</li> <li>• TMHP and PSO will work with PSO's current EVV system (when applicable) for a Data Transfer plan (which must occur 45 days prior to the Go-Live date.</li> <li>• TMHP will provide approval to EVV Vendors to provide data transfer files to the PSO (when applicable).</li> </ul>

Task	Responsible Party	Due Date	Resources
18. TMHP issues production credentials.	TMHP	10 business days before their Go-Live date.	<ul style="list-style-type: none"><li>• TMHP sets up security access, and PSO system information in the EVV Aggregator in production</li><li>• TMHP securely shares production security credentials with PSO</li></ul>
19. TMHP and HHSC verify production system operation.	TMHP, HHSC	Go-Live plus up to 30 business days.	<ul style="list-style-type: none"><li>• TMHP and HHSC monitor through internal metrics</li><li>• HHSC updates the list of EVV Proprietary Systems Approved by HHSC (if applicable)</li><li>• HHSC updates the EVV Proprietary System Access and Training Guide</li></ul>