



TEXAS
**Health and Human
Services**

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

Version: 4.2

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

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

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

This document describes the process to obtain HHSC approval of a proprietary system.

There are two onboarding paths that can be taken for a program provider or FMSA to become a PSO:

- **The Standard Path** is for requesting approval to use an EVV system **that HHSC has not been previously approved.**
- **The Expedited Path** is for requesting approval to use an existing operational EVV system **that HHSC has previously approved.**
 - The list of approved EVV Proprietary Systems can be found on the [TMHP EVV Proprietary Systems webpage](#).

The PSO Onboarding Process consists of several phases depending on the PSO selection of Standard Path or Expedited Path:

Standard Path Onboarding Process

- ❖ Onboarding Plan
- ❖ Proprietary System Customization
- ❖ Operational Readiness Review
- ❖ Operational Readiness Determination
- ❖ Deployment

Expedited Path Onboarding Process

- ❖ Onboarding Plan
- ❖ Operational Readiness Review (expedited ORR to only include TPT and any additional review based on PSO selection of new or updated features in the original approved proprietary system)
- ❖ Operational Readiness Determination
- ❖ Deployment

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](#). Program providers and FMSAs must ensure that the Proprietary System they are onboarding with is fully developed and complies with all HHSC EVV policy, HHSC EVV business rules for Proprietary Systems and requirements of the Texas Government Code Section 531.024172 or its successors, prior to the Operational Readiness Review (ORR) session start date.

| Task | Responsible Party | Due Date | Resources |
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| 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"> • TMHP EVV Proprietary System Web Page • HHSC EVV Proprietary Systems Web Page |
| 2. Program provider or FMSA must complete and submit EVV Proprietary System Request Form to TMHP via email. | Program provider or FMSA | Anytime throughout the year. | <ul style="list-style-type: none"> • EVV Proprietary System Request Form • Email to: EVV_PSO@tmhp.com |
| 3. HHSC assigns the program provider or FMSA to a Standard 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 via email. | HHSC, TMHP | Prior to the start of the assigned ORR Start Date as determined by HHSC. | <ul style="list-style-type: none"> • After receipt of the completed EVV Proprietary System Request Form. • Inform program provider or FMSA of the Go-Live Date scheduled by HHSC for the assigned session. • HHSC provides Certification Form. Documentation and Demonstration Scenarios. |
| 4. Program provider or FMSA must confirm the assigned Standard ORR Session. | Program provider or FMSA | 5 business days after HHSC assignment email is sent to program provider or FMSA. | <ul style="list-style-type: none"> • Email to: EVVPSO@hhs.texas.gov • Email to: EVV_PSO@tmhp.com |
| 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 | Prior to the start of the assigned ORR Start Date as determined by HHSC. | <ul style="list-style-type: none"> • TMHP technical support as needed • TMHP to set up testing environment for program provider or FMSA • Program provider or FMSA to submit a test transaction to the TMHP EVV Aggregator testing environment. • 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. |

| Task | Responsible Party | Due Date | Resources |
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| 6. Program provider or FMSA receives a customized scoring worksheet Demonstration and Documentation scenarios. | HHSC | Prior to the start of the assigned ORR Start Date as determined by HHSC. | <ul style="list-style-type: none"> HHSC to provide customized worksheets to each PSO. |
| 7. 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"> Confirm awareness of all technical requirements HHSC to provide customized Certification Form to PSO. Discuss Go-Live requirements Review next steps |
| 8. Program provider or FMSA must submit the signed HHSC Certification form by email to HHSC. | Program provider or FMSA | 1 st day of ORR session. | <ul style="list-style-type: none"> HHSC Certification Form Email to: EVVPSO@hhs.texas.gov Email to: EVV_PSO@tmhp.com |
| 9. Program provider or FMSA conducts ORR demonstrations with HHSC and TMHP as assigned. All required Demonstration Scenarios must be presented during Round 1. | Program provider or FMSA, TMHP, HHSC | 1 st day of ORR session. | <ul style="list-style-type: none"> Round 1 is 10 days (3 demos + 5 days of correction by program provider or FMSA) Round 2 is 8 days (2 demos + 5 days of correction by program provider or FMSA) Round 3 is 2 days (2 demos) |
| 10. Program provider or FMSA submits ORR documentation files to HHSC for review. | Program provider or FMSA, HHSC | 1 st day of ORR session. | <ul style="list-style-type: none"> Documentation reviews will take place throughout the 20 days for the rounds. |
| 11. Program provider or FMSA to receive scoring for ORR Demonstration scenarios. | HHSC | At the completion of each ORR round. | <ul style="list-style-type: none"> HHSC to provide updated documentation and demonstration scoring at the conclusion of each ORR round. |
| 12. Trading Partner Testing (TPT) files are due to TMHP. | Program provider or FMSA, TMHP | Due date assigned by TMHP during Step 7. | <ul style="list-style-type: none"> Program provider or FMSA required to submit EVV Visit Transaction files and inform TMHP of file submission by designated due date throughout the scheduled ORR. |
| 13. 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 approval:</p> <ul style="list-style-type: none"> Program provider or FMSA must pass all required demonstration, documentation and TPT scenarios within the scheduled ORR timeframe to be approved to use the selected proprietary system Program provider or FMSA is notified of their Approval and Go-Live date scheduled by HHSC. <p>For rejection:</p> <ul style="list-style-type: none"> Ask program provider or FMSA if they wish to be placed on a waiting list for a future session |
| 14. 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"> Confirm Go-Live date (Program provider or FMSA must go-live with the new EVV system within 45-90 calendar days of HHSC Approval Date provided in Step 11) |

| Task | Responsible Party | Due Date | Resources |
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| 15. 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"> HHSC approval is documented via email. For rejection: <ul style="list-style-type: none"> Explanation of rejection is provided with Go-Live Date options. PSO will be directed to submit new Go-Live date for HHSC and TMHP approval within 3 business days of rejection notification email. |
| 16. HHSC provides PSO Approval or Denial Letter via email electronic attachment. | HHSC | 3 business days after Go-Live Date scheduled by HHSC | For approval: <ul style="list-style-type: none"> Transmit acceptance letter on HHSC letterhead to PSO's Signature Authority For rejection: <ul style="list-style-type: none"> Transmit rejection letter on HHSC letterhead to program provider or FMSA Signature Authority |
| 17. Program provider or FMSA approved by HHSC must submit signed Termination Form to current EVV System vendor (when applicable) | Program provider or FMSA | 45 calendar days before Go-Live Date scheduled by HHSC | <ul style="list-style-type: none"> EVV vendor Termination Forms require a signed Termination Form to be received 45 calendar days before Go-Live Date scheduled by HHSC. |
| 18. PSO must perform Data Transfer from current EVV System to new EVV System (when applicable). | PSO | 10 business days before their Go-Live Date scheduled by HHSC. | <ul style="list-style-type: none"> TMHP provides support as necessary (if transferring from State Approved Vendor) 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 scheduled by HHSC. TMHP will provide approval to EVV Vendors to provide data transfer files to the PSO (when applicable). |
| 19. TMHP issues production credentials. | TMHP | 10 business days before their Go-Live date scheduled by HHSC. | <ul style="list-style-type: none"> TMHP sets up security access, and PSO system information in the EVV Aggregator in production TMHP securely shares production security credentials with PSO |
| 20. TMHP and HHSC verify production system operation. | TMHP, HHSC | Go-Live date scheduled by HHSC plus up to 30 business days. | <ul style="list-style-type: none"> TMHP and HHSC monitor through internal metrics HHSC updates the list of EVV Proprietary Systems Approved by HHSC (if applicable) HHSC updates the EVV Proprietary System Access and Training Guide |

Expedited Path Onboarding 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 |
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| 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. Email the Approved EVV System Contact to coordinate onboarding activities. | Program provider or FMSA | Prior to the submission of the EVV Proprietary System Request Form. | <ul style="list-style-type: none"> • TMHP EVV Proprietary System Web Page • HHSC EVV Proprietary Systems Web Page |
| 2. Program provider or FMSA must complete and submit EVV Proprietary System Request Form to TMHP via email. | Program provider or FMSA | Anytime throughout the year. | <ul style="list-style-type: none"> • EVV Proprietary System Request Form • Email to: EVV_PSO@tmhp.com |
| 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 via email. | HHSC, TMHP | Prior to the start of the assigned ORR Start Date as determined by HHSC. | <ul style="list-style-type: none"> • After receipt of the completed EVV Proprietary System Request Form. |
| 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"> • Email to: EVVPSO@hhs.texas.gov • Email to: EVV_PSO@tmhp.com |
| 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 | Prior to the start of the assigned ORR Start Date as determined by HHSC. | <ul style="list-style-type: none"> • TMHP technical support as needed • TMHP to set up testing environment for program provider or FMSA. • Program provider or FMSA to submit a test transaction to the TMHP EVV Aggregator testing environment. • 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 |

| Task | Responsible Party | Due Date | Resources |
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| | | | cause a delay to re-establish connectivity and to complete the TPT testing phase of the ORR. |
| 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"> Confirm awareness of all technical requirements Confirm selected EVV System and features to be used HHSC to provide customized Certification Form to PSO. Discuss Go-Live requirements Review next steps |
| 7. Program provider or FMSA must submit the signed HHSC Certification form via email to HHSC. | Program provider or FMSA | 1 st day of ORR session. | <ul style="list-style-type: none"> HHSC Certification Form Email to: EVVPSO@hhs.texas.gov Email to: EVV_PSO@tmhp.com |
| 8. Required Trading Partner Testing (TPT): 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 6. | <ul style="list-style-type: none"> The Expedited ORR schedule will be customized per program provider or FMSA. Program provider or FMSA is required to submit EVV Visit Transaction files and inform TMHP of file submission by designated due date throughout the scheduled ORR. TMHP confirms successful processing of EVV visit transaction data. |
| 9. Optional Demonstrations: HHSC will determine if the program provider or FMSA must demonstrate features of the chosen EVV system that HHSC has not previously approved. | Program provider or FMSA, TMHP, HHSC | 1 st day of ORR (if required) | <ul style="list-style-type: none"> If required, HHSC will schedule demonstration review sessions at the beginning of the ORR process to expedite review and scoring of features. |
| 10. Optional Documentation Review: HHSC will determine if the program provider or FMSA must provide documentation for features of the chosen EVV system that HHSC has not previously approved. | Program provider or FMSA, TMHP, HHSC | 1 st day of ORR (if required) | <ul style="list-style-type: none"> If required, the program provider or FMSA must submit documentation at the beginning of the ORR process to expedite review and scoring. |
| 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 | 1 business day after completion of all components of the ORR. | <p>For approval:</p> <ul style="list-style-type: none"> Program provider or FMSA is notified of their Approval and Go-Live date scheduled by HHSC. <p>For rejection:</p> <ul style="list-style-type: none"> Ask program provider or FMSA if they wish to be placed on a waiting list for a future session |
| 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"> Confirm Go-Live date (Program provider or FMSA must go-live with the new EVV system within 45-90 calendar days of HHSC Approval Date provided in Step 13) |
| 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"> HHSC approval is documented via email. <p>For rejection:</p> <ul style="list-style-type: none"> Explanation of rejection is provided with Go-Live Date options. |

| Task | Responsible Party | Due Date | Resources |
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| | | | <ul style="list-style-type: none"> PSO will be directed to submit new Go-Live date for HHSC and TMHP approval within 3 business days of rejection notification email. |
| 14. HHSC provides PSO Approval or Denial Letter via email electronic attachment. | HHSC | 3 business days after Go-Live date scheduled by HHSC | For approval: <ul style="list-style-type: none"> Transmit acceptance letter on HHSC letterhead to program provider's or FMSA's Signature Authority For rejection: <ul style="list-style-type: none"> Transmit rejection letter on HHSC letterhead to program provider's or FMSA's Signature Authority |
| 15. Program provider or FMSA approved by HHSC submits signed Termination Form to current EVV System vendor. | Program provider or FMSA | 45 calendar days before Go-Live Date scheduled by HHSC | <ul style="list-style-type: none"> EVV vendor Termination Forms require a signed Termination Form to be received 45 calendar days before the Go-Live Date scheduled by HHSC. |
| 16. PSO must perform Data Transfer from current EVV System to new EVV System (when applicable). | PSO | 10 business days before their Go-Live Date scheduled by HHSC. | <ul style="list-style-type: none"> TMHP provide support as necessary (if transferring from State Approved Vendor) 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 scheduled by HHSC. TMHP will provide approval to EVV Vendors to provide data transfer files to the PSO (when applicable). |
| 17. TMHP issues production credentials. | TMHP | 10 business days before their Go-Live date scheduled by HHSC. | <ul style="list-style-type: none"> TMHP sets up security access, and PSO system information in the EVV Aggregator in production TMHP securely shares production security credentials with PSO |
| 18. TMHP and HHSC verify production system operation. | TMHP, HHSC | Go-Live Date scheduled by HHSC plus up to 30 business days. | <ul style="list-style-type: none"> TMHP and HHSC monitor through internal metrics HHSC updates the list of EVV Proprietary Systems Approved by HHSC (if applicable) HHSC updates the EVV Proprietary System Access and Training Guide |