



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

Standard Path Process for  
Operational Readiness Review (ORR)  
Version: 1.2

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

An **EVV proprietary system** is an HHSC-approved EVV system that a program provider or financial management services agency (FMSA) may 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.

An **EVV Proprietary System Operator (PSO)** is a program provider or FMSA that uses an HHSC-approved EVV proprietary system.

The Standard Path ORR schedule is published on the [TMHP Proprietary Systems webpage](#). The **Standard Path PSO Onboarding Process** will consist of the following phases:

- Planning
  - Includes validation of EVV Proprietary System Request Forms (Request Forms) on the PSO waitlist and making Standard Path ORR session assignments.
- Standard Path ORR Session
  - Includes program provider or FMSA Certification Form submission. **Certification Form must be signed by the Signature Authority listed on the PS Request Form and submitted by ORR Start Date.**
  - Includes Trading Partner Testing, Demonstration and Documentation of the PS.
    - Documentation – Program providers or FMSAs must provide specified documentation for HHSC review. **All required Demonstration Scenarios must be presented during Round 1.**
    - Demonstration – Program providers or FMSAs must show system functionality using specific HHSC-approved scenarios. **All required documentation must be submitted for evaluation on ORR Start Date.**
    - Trading Partner Testing – Program providers or FMSAs must complete Trading Partner Testing with TMHP according to specific HHSC-approved scenarios. **All required TPT Scenarios must be submitted during Round 1.**
  - Includes Operational Readiness Determination.
    - Customized scoring worksheets are used to evaluate the PS based on information submitted on the program provider or FMSA Request Form.
- Go-Live
  - Date the PSO is onboarded with the approved PS. Approved PSO chooses the go-live date.

## Standard Path PSO Onboarding Process Overview and Timeline

**When requesting approval to use an EVV System that has not been previously approved by HHSC or a previously approved system will be implementing new functionality that hasn't been previously evaluated.**

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 or a previously approved system will be implementing new functionality that hasn't been previously evaluated.

The following pages provide the PSO onboarding process overview and timelines when requesting approval to use an EVV system that HHSC has not previously approved or when the previously approved system will be implementing new functionality that hasn't been previously evaluated.

**Important Note:** Proprietary system vendors onboarding with a program provider or FMSA in a Standard Path onboarding session are strongly encouraged to consider all EVV system functionality that onboarding program providers or FMSAs and future program providers or FMSAs may require to support their EVV-required service delivery when preparing for demonstrations during the Standard Path ORR. 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.

The timeframe to complete the Standard Path onboarding process is 2 months between attendance at the Planning Meeting to the earliest Go-Live date. **Note: the elapsed time between Request Form submission and the Planning Meeting is not part of the published ORR session timeframe.**

Task	Responsible Party	Due Date	Resources
1. Program provider or FMSA must access, review, and have an understanding of all PSO technical requirements, HHSC EVV Policy Handbook and the HHSC EVV Business Rules for Proprietary Systems. Program provider or FMSA is responsible for coordinating onboarding activities with their selected proprietary system. Program provider or FMSA is responsible for ensuring the selected proprietary system is fully developed and compliant with current HHSC EVV policy and business rules.	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> <li>• <a href="#">EVV Policy Handbook</a></li> <li>• <a href="#">EVV Policy Handbook- Section 5000</a></li> </ul> <p><b>*Note: Per Section 5040 in the HHSC EVV Policy Handbook: Program provider or FMSA is responsible for ensuring that their selected EVV Proprietary System is fully developed and compliance with HHSC EVV Policy and Business Rules prior to the ORR Start Date.</b></p>
2. Program provider or FMSA must complete and submit EVV Proprietary System Request Form via EVV Portal. Program provider or FMSA will receive a Confirmation Number (unique Request Form ID) upon successful submission of the Request Form.	Program provider or FMSA	Anytime throughout the year.	<ul style="list-style-type: none"> <li>• TMHP will review and validate information and update Request Form Status.</li> <li>• Validated Request Forms will be placed on the PSO Waitlist based on the Request Form submission date and time.</li> </ul> <p><b>*Note:</b> EVV Portal access is required to submit a request form. Refer to the <a href="#">Accessing the EVV Portal for Program Providers and</a></p>

Task	Responsible Party	Due Date	Resources
			<p><a href="#">FMSAs job aid</a> for more information. Request forms that are emailed to HHSC or TMHP will not be accepted.</p> <p><b>*Note: The submission of a request form does not guarantee an assignment to a PSO ORR session. TMHP will review the submitted Request Form and PSO ORR session requirements.</b></p>
<p>3. TMHP assigns the program provider or FMSA and PS Vendor, via email invitation, to a Standard Path ORR session.</p>	<p>TMHP</p>	<p>After Request Form validation is completed.</p>	<ul style="list-style-type: none"> <li>• ORR assignments are made based on the position on the PSO Waitlist, ORR requirements, and available slots for Standard Path ORRs.</li> <li>• If a previously approved system is implementing new system functionality, please inform TMHP via email and provide details, to be included within the Standard ORR.</li> </ul> <p><b>*Note:</b> The following EVV Proprietary System ORR Compliance Method documents may be required to pass a Standard Path ORR session:</p> <p><a href="#">Certification (Example)</a>  <a href="#">Trading Partner Testing Demonstration Documentation</a></p>
<p>4. Program provider or FMSA in conjunction with their PS Vendor <b>must accept</b> the Standard Path ORR session assignment via email by the deadline in the invitation email.</p>	<p>Program provider or FMSA, PS Vendor, TMHP</p>	<p>Five (5) business days after the ORR invitation email is sent to program provider or FMSA.</p>	<ul style="list-style-type: none"> <li>• Email to: <a href="mailto:EVV_PSO@tmhp.com">EVV_PSO@tmhp.com</a></li> </ul> <p><b>*Note: Failure to respond by the deadline may result in removal from the assigned Standard Path ORR session.</b></p>
<p>5. Program provider or FMSA and PS Vendor must successfully submit a test transaction to the TMHP testing environment to confirm TMHP EVV System Access and Connectivity.</p>	<p>Program provider or FMSA, PS Vendor, TMHP</p>	<p>20 business days prior to the assigned ORR Start Date.</p>	<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 and PS Vendor.</li> <li>• Program provider or FMSA and PS Vendor to submit a test transaction to the TMHP EVV Aggregator testing environment.</li> </ul> <p><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></p>

Task	Responsible Party	Due Date	Resources
6. Program provider or FMSA and the selected PS vendor must attend an ORR Planning Meeting with HHSC and TMHP. Failure to attend the ORR Planning Meeting may result in removal from the Standard Path ORR session.	Program provider or FMSA, PS vendor, TMHP, HHSC	Ten (10) business days prior to the assigned ORR session.	<ul style="list-style-type: none"> <li>• TMHP will review all technical, Demonstration and Documentation requirements.</li> <li>• TMHP will discuss Go-Live requirements</li> <li>• TMHP will review next steps</li> </ul> <p><b>*Note: Per Section 5040 in the HHSC EVV Policy Handbook: Program provider or FMSA is responsible for ensuring that their selected EVV Proprietary System is fully developed and compliance with HHSC EVV Policy and Business Rules prior to the ORR Start Date.</b></p>
7. Program provider or FMSA <b>must submit</b> the customized and signed Certification Form to TMHP.	Program provider or FMSA	ORR Start Date.	<ul style="list-style-type: none"> <li>• HHSC Certification Form</li> <li>• Email to: <a href="mailto:EVV_PSO@tmhp.com">EVV_PSO@tmhp.com</a></li> </ul>
8. Program provider or FMSA and PS vendor conduct ORR demonstrations with HHSC and TMHP as assigned. <b>All required Demonstration Scenarios must be presented during Round 1.</b>	Program provider or FMSA, PS vendor, TMHP, HHSC	ORR Start Date.	<ul style="list-style-type: none"> <li>• Round 1 is 10 days (3 demos + 5 days of correction by program provider or FMSA and PS Vendor)</li> <li>• Round 2 is 8 days (2 demos + 5 days of correction by program provider or FMSA and PS Vendor)</li> <li>• Round 3 is 2 days (2 demos)</li> <li>• Revised scoring worksheets are delivered to providers/FMSAs after each demonstration round.</li> </ul> <p><b>*Note: Failure to present all required Demonstration Scenarios will result in PS Vendor rejection from current ORR. Program Provider or FMSA must request to be placed back on the waitlist.</b></p>
9. Program provider or FMSA submits ORR documentation files to TMHP for review. <b>All required documentation files must be submitted for evaluation on ORR Start Date.</b>	Program provider or FMSA, PS Vendor, TMHP	ORR Start Date.	<ul style="list-style-type: none"> <li>• Documentation reviews will take place throughout the 20 days for the rounds.</li> <li>• Revised scoring worksheets are delivered to providers/FMSAs after each demonstration round.</li> </ul> <p><b>*Note: Failure to submit all required Documentation Scenarios will result in PS Vendor rejection from current ORR. Program Provider or FMSA must request to be placed back on the waitlist.</b></p>
10. Trading Partner Testing (TPT) files are due to TMHP. <b>All required TPT Scenarios must be submitted during Round 1.</b>	Program provider or FMSA, PS Vendor, TMHP	ORR Start Date.	<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.</li> <li>• Revised scoring worksheets are delivered to providers/FMSAs by COB Fridays.</li> </ul> <p><b>*Note: Failure to submit all required TPT Scenarios will result in PS Vendor rejection from current ORR. Program Provider or FMSA must request to be placed back on the waitlist.</b></p>

Task	Responsible Party	Due Date	Resources
11. TMHP informs program provider or FMSA via email of HHSC's approval or rejection to use a proprietary system to submit EVV visits to the TMHP Aggregator.	TMHP	Following the completion of the assigned ORR.	For approval: <ul style="list-style-type: none"> <li>Program provider or FMSA is notified of their Approval via email and TMHP will request the Go-Live Date to onboard with the newly approved PS Vendor.</li> </ul> For rejection: <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>
12. Program provider or FMSA submits the Go-Live Date.	Program provider or FMSA, PS Vendor	Three (3) business days after approval notification.	Program provider or FMSA and their PS vendor must consider the following: <ul style="list-style-type: none"> <li>Current EVV System Termination requirements.</li> <li>Data Transfer timeframe required by current EVV system.</li> <li>Time to train staff on the new EVV system.</li> </ul> <b>*Note: Failure to respond by the deadline may result in removal from the assigned Standard Path ORR session.</b>
13. TMHP informs PSO via email of approval or rejection of the Go-Live Date.	TMHP	Following confirmation of Go-Live Date.	For approval: <ul style="list-style-type: none"> <li>TMHP approval is documented via email.</li> </ul> For rejection: <ul style="list-style-type: none"> <li>Explanation of 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 three (3) business days of rejection notification email.</li> </ul>
14. TMHP provides PSO Approval or Denial Letter via email electronic attachment.	TMHP	Following confirmation of Go-Live Date.	For approval: <ul style="list-style-type: none"> <li>Transmit acceptance letter to PSO's Signature Authority.</li> </ul> For rejection: <ul style="list-style-type: none"> <li>Transmit rejection letter on to program provider or FMSA Signature Authority.</li> </ul>
15. PSOs currently onboarded with an EVV System vendor must submit a Termination Form within the timeframes required by the current EVV system vendor and before the approved Go-Live Date.	Program provider or FMSA	As required by current EVV System before Go-Live Date.	<ul style="list-style-type: none"> <li>Program provider or FMSA must reach out to their current EVV system vendor to determine requirements for submission of a Termination Form and data transfer timeframes.</li> <li>Program provider or FMSA must determine go-live with the new EVV system based on termination notice and data transfer timeframe requirements of the current EVV system vendor within and TMHP's go-live requirements.</li> <li>Program Providers must ensure with their vendors the ability for visit maintenance and visit maintenance unlock requests.</li> </ul>

Task	Responsible Party	Due Date	Resources
16. PSO may perform Data Transfer from current EVV System to new EVV System (when applicable).	PSO	As required by current EVV System before Go-Live Date.	<ul style="list-style-type: none"> <li>• TMHP provides support as necessary (if transferring from the State EVV Vendor).</li> <li>• TMHP and PSO will work with PSO's current EVV System (when applicable) for data transfer.</li> <li>• TMHP will provide approval to the State EVV Vendors to provide data transfer files to the PSO (when applicable).</li> <li>• Program Providers must ensure with their vendors the ability for visit maintenance and visit maintenance unlock requests.</li> </ul>
17. TMHP implements production changes for the PSO Go-Live.	TMHP, PS Vendor	Ten (10) business days before their Go-Live date.	<ul style="list-style-type: none"> <li>• TMHP sets up security access, and PSO system information (Vendor ID, Display Name, and the NPI/API to EVV System crosswalk) in the production environment for the EVV Aggregator.</li> </ul>
18. PS Go-Live activity for the PSO(s)	Program provider or FMSA and PS Vendor	Go-Live Date.	<ul style="list-style-type: none"> <li>• Setting up system access for all system users including PSO, HHSC and MCOs.</li> </ul>
19. TMHP and HHSC verify production system operation.	TMHP, HHSC	Go-Live date plus up to 30 business days.	<ul style="list-style-type: none"> <li>• TMHP and HHSC monitor through internal metrics.</li> <li>• TMHP updates the list of EVV Proprietary Systems Approved by HHSC (if applicable).</li> </ul>