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

Special Abbreviated Path for
Session 4
Operational Readiness Review (ORR)
Version: 2.0

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 the state Medicaid claims administrator, Texas Medicaid & Healthcare Partnership (TMHP), through a special abbreviated path, Session 4 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 Session 4 ORR schedule is published on the [TMHP Proprietary Systems webpage.](#) The **2023 Session 4 ORR PSO Onboarding Process** will consist of the following phases:

- Expedited ORR (to only include EVV Proprietary System connectivity testing with the EVV Aggregator)
- Operational Readiness Determination
- Deployment

The following pages provide the Session 4 ORR onboarding process overview and timelines when requesting approval to use an existing operational EVV system that HHSC has previously approved.

**Session 4 ORR Onboarding Process Overview and Timeline
When Requesting Approval to use an EVV System Approved by HHSC**

*** Please note: Session 4 ORR assignments cannot be confirmed until the selected proprietary system has completed an ORR to demonstrate compliance with EVV Business Rules for Proprietary Systems v3.0 (Business Rules v3.0).

Compliance ORRs for Operational PSOs began in April 2023 and are progressing through July 17, 2023. Participation in a Compliance ORR does not guarantee HHSC approval. Therefore, Program providers and FMSAs must discuss the expected timeline with the proprietary system vendor contact to determine if the proprietary system will complete the Business Rules 3.0 Compliance ORRs in time for the program provider or FMSA to onboard with them through a Session 4 ORR.

Compliance ORRs for EVV proprietary systems for those in Session 3 Standard Path are complete and approved as of May 4, 2023. The program provider or FMSA must coordinate submission of the EVV Proprietary System Request Form (Request Form) and all onboarding activities with their selected proprietary system vendor to meet the onboarding milestones outlined below. ***

As of May 4, 2023 all Session 4 ORR slots have been filled and no further assignments are being made by TMHP. Providers who were not assigned to a slot should continue to follow this process to submit their Proprietary System Request form and will be placed in a queue for possible future assignment.

Program providers and FMSAs interested in participating in possible future Session 4 ORR assignments will follow this process when choosing a previously approved proprietary system from the list of EVV Proprietary Systems Approved by HHSC (PDF). If the program provider or FMSA requests EVV system features other than those on the list of EVV Proprietary Systems Approved by HHSC or from the list of of EVV Proprietary Systems Undergoing ORR in Session 3 Standard Path, the program provider or FMSA will not be able to participate in a Session 4 ORR and will be placed on a waitlist for a future ORR session.

Program providers and FMSAs interested in a possible future Session 4 ORR assignment must submit a completed EVV Proprietary System Request Form (Request Form) to TMHP. HHSC encourages program providers and FMSAs to read this Session 4 ORR PSO Onboarding Overview and Timeline document carefully, discuss with your selected PS contact, and submit a completed Request Form as soon as possible. HHSC and TMHP will provide guidance regarding possible future Session 4 ORR participation based on analysis of the EVV Proprietary System Request Form submitted by the PSO.

HHSC is not responsible for performance or functionality of any of the EVV proprietary systems. Program providers and FMSAs are responsible for ensuring the selected EVV proprietary system meets their business needs and will be responsible for ensuring that the EVV proprietary system remains in compliance with all current and future EVV Business Rules and EVV Policies.

Task	Responsible Party	Due Date	Notes & 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 is	Program provider or FMSA	Prior to the submission of the EVV Proprietary	• TMHP EVV Proprietary System Web Page • HHSC EVV Proprietary Systems Web Page • EVV Proprietary Systems Approved by HHSC • HHSC EVV Policy Handbook

Task	Responsible Party	Due Date	Notes & Resources
responsible for coordinating onboarding activities with proprietary systems.		System Request Form.	• [EVV Proprietary Systems Undergoing ORR](#) in Session 3 Standard Path
2. Program provider or FMSA must complete and submit EVV Proprietary System Request Form to TMHP via email. The Program provider or FMSA must also inform TMHP of any data transfer and termination needs.	Program provider or FMSA	No deadlines have been established for possible future Session 4 assignments. Submit at any time.	• [EVV Proprietary System Request Form](#) • Email to: EVV_PSO@tmhp.com
3. TMHP acknowledges receipt of a completed Request Form and informs program provider or FMSA of the EVV BRs v3.0 compliance status of the selected proprietary system. TMHP adds the program provider or FMSA to the Session 4 ORR queue and delivers a Termination Form to the program provider or FMSA if applicable. Program providers or FMSAs will be informed of any Go-Live date restrictions at this time.	TMHP	After receipt of a Request Form	• **Inclusion in the Session 4 ORR queue does not guarantee assignment to a Session 4 ORR as that is dependent on when the selected proprietary system completes the Compliance ORR and any termination notice and data transfer requirements.**
4. PSOs currently onboarded with a State EVV Vendor must submit a Termination Form within the timeframes required by that EVV Vendor and before the Go-Live Date scheduled by HHSC. PSOs who are not currently onboarded with a State EVV Vendor can ignore this step and are not required to submit a termination notice to Go-Live.	Program provider or FMSA	Per EVV Vendor Requirements	• Program provider or FMSA must reach out to their current State EVV Vendor to determine requirements for submission of a Termination Form.
5. TMHP informs the program provider or FMSA via email invitation, of assignment to a Session 4 ORR session which consists of activities between the program provider or FMSA, HHSC, and TMHP. The Session 4 ORR assignment email will include a proposed TMHP Vendor ID and EVV Portal Display Name for the program provider or FMSA to approve, the Certification Form to be signed by the Signature Authority and will request permission from the program provider or FMSA to publish information in the HHSC EVV Proprietary Systems Approved by HHSC document available on the [TMHP EVV Proprietary Systems webpage](#). TMHP will request a Go-Live Date from the program provider or FMSA.	HHSC, TMHP	Three weeks prior to the start of the assigned Session 4 ORR Start Date	• Assignments are made based on the receipt date of the Request Form, completion of the Compliance ORR, data transfer requirements, and available slots for Session 4 ORRs. • Program providers or FMSAs are encouraged to discuss the publication of their business and proprietary system information with their selected proprietary system vendor HHSC and TMHP may provide a Go-Live Date for those program providers or FMSAs that are constrained by termination notice and/or data transfer requirements. • TMHP Vendor ID uniquely identifies each PSO in the EVV Aggregator. • EVV Portal Display Name allows PSOs to filter the data in the EVV Aggregator as displayed in the EVV Portal by their unique display name.

Task	Responsible Party	Due Date	Notes & Resources
6. Program provider or FMSA **must confirm** the assigned Session 4 ORR session date, the proposed TMHP Vendor ID and EVV Portal Display Name and the approved HHSC Go-Live Date. Program provider or FMSA **must submit** the signed Certification Form and indicate if they give permission to be published in the "*HHSC EVV Proprietary Systems Approved by HHSC*" document that is available from the TMHP EVV Proprietary Systems webpage.	Program provider or FMSA, TMHP	Five business days after the HHSC Session 4 ORR invitation email is sent to program provider or FMSA.	• HHSC Certification Form • Email to: EVV_PSO@tmhp.com
7. TMHP sets up the PSO in the EVV Aggregator test environment with the approved TMHP Vendor ID and EVV Portal Display Name.	Program provider or FMSA, TMHP	Two weeks prior to the start of the assigned Session 4 ORR Start Date	• TMHP has set up the testing environment for program provider or FMSA. • **Note: As per the State's policy, TMHP secure file tranfer protocol (SFTP) accounts must be used to transmit EVV visit transactions every 89 calendar days to remain active. Failure to submit a test EVV visit 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 connectivity phase of the ORR.**
8. Program provider or FMSA must ensure that their selected proprietary system vendor submits the required TMHP Connectivity technical information which includes: NPI associated with each PSO that will be used during connectivity testing and 3 test Medicaid IDs for each NPI being used for testing.	Program provider or FMSA, TMHP	5 business days prior to the start of the assigned Session 4 ORR Start Date	• TMHP technical support will be provided as needed
9. Program provider or FMSA and the selected proprietary system vendor must successfully submit an EVV transaction file to the TMHP testing environment to confirm the TMHP EVV System Access and Connectivity. If the Program provider has more than one associated NPI, only one EVV transaction file is required for each unique TMHP Vendor ID.	Program provider or FMSA, TMHP	1st and 2nd day of Session 4 ORR assignment.	• TMHP technical support is provided as needed. • Submitted EVV transaction file should not be rejected
10. TMHP and HHSC informs program provider or FMSA via email of HHSC's approval or denial to use the selected proprietary system to submit EVV visits to the TMHP Aggregator.	HHSC, TMHP	5th day of Session 4 ORR	For approval: • Program provider or FMSA is notified of their PSO Approval and Go-Live date approval . For rejection:

Task	Responsible Party	Due Date	Notes & Resources
			• Ask program provider or FMSA if they wish to be placed on a waiting list for a future ORR session.
11. HHSC provides PSO Approval or Denial Letter via email electronic attachment.	HHSC	Beginning of the month following the Approval or Denial notification email	For approval: • Transmit electronic Approval Letter on HHSC letterhead to program provider's or FMSA's Signature Authority. For rejection: • Transmit electronic Denial letter on HHSC letterhead to program provider's or FMSA's Signature Authority.
12. 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 scheduled by HHSC.	• TMHP provides support as necessary (if transferring from a State EVV Vendor). • TMHP and PSO will work with PSO's current EVV System (when applicable) for a data transfer. • TMHP will provide approval to the State EVV Vendors to provide data transfer files to the PSO (when applicable).
13. TMHP implements production changes for the PSO Go-Live.	TMHP	10 business days before their Go-Live date .	• 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.
14. PS Go-Live activity for the PSO(s)	Program provider or FMSA and PS Vendor	Go-Live Date	• Training of system users. • Setting up system access for all system users including PSO, HHSC and MCOs.
15. TMHP and HHSC verify production system operation.	TMHP, HHSC	Go-Live Date scheduled by HHSC plus up to 10 business days.	• 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 (PDF).