

Proprietary System Operator
EVV Proprietary System
Compliance Method – Demonstration Scenarios
Version 2.0

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Introduction

To gain Texas Health and Human Services Commission (HHSC) approval to use an Electronic Visit Verification (EVV) proprietary system to electronically document and verify the data elements for a service delivery visit, the program provider or Financial Management Services Agency (FMSA) must:

- Comply with the Texas Administrative Code (TAC) and HHSC EVV Policy as they relate to EVV proprietary systems;
- Comply with the HHSC EVV Business Rules for Proprietary Systems document
- Successfully complete all steps of the Readiness Review process.

HHSC will use four methods to determine compliance during the Readiness Review process:

- Attestation
- Demonstration
- Documentation
- Trading Partner Testing (TPT) with the Texas Medicaid and Healthcare Partnership (TMHP)

This document covers the demonstration method of determining the compliance of the EVV proprietary system. The program provider or FMSA must successfully demonstrate that their EVV proprietary system complies with each business rule contained in this document (a subset of the business rules contained in the HHSC EVV Business Rules for Proprietary Systems document, v1.0 dated 1/31/2020), unless HHSC has explicitly waived that business rule, in whole or in part, as not applicable to its EVV proprietary system at this time (refer to your EVV Proprietary System Operator Attestation Form). HHSC may also waive demonstration scenarios listed below during Readiness Review based on the PSO responses in their Detailed Questionnaire. The Questions from the Detailed Questionnaire are referenced in the waiver statements within the scenarios where this applies. The program provider or FMSA can find references to specific questions on the PS Detailed Questionnaire within these scenarios.

Each Proprietary System Operator (PSO) will coordinate with HHSC to establish a date, time and location for the demonstration, as well as discuss expectations for the demonstration and any technology requirements that may impact the demonstration. The PSO will complete data setup identified in step #1 of each demonstration prior to the demonstration. The PSO will perform the remaining steps in each demonstration in a live webinar. All references to Service Attendant, System User, etc. in the demonstration steps indicate a user role, all of which the PSO can demonstrate with one individual signing in using different credentials for each role.

Business Rules and Scenarios to be Demonstrated

1. *EVM-3P*

Business Rule

EVM-3P: ‘EVV System’ must accept clock-in and clock-out data via ‘Member’ home landline phone.

1.1. Home Landline – With Schedule

Note: HHSC may waive this scenario if the PSO is not using the Landline Electronic Verification Method (Question 20 is No).

Demonstration Steps

1. **Data Setup in the EVV System:**

- a. Member with a home landline registered in the EVV System
- b. Service Attendant
- c. Scheduled visit

2. **System User demonstrates, and Readiness Review (RR) team verifies that:**

- a. A Service Attendant calls the Interactive Voice Response (IVR) from the Member’s home landline phone and enters the required information to successfully record the clock in.
- b. A Service Attendant calls the IVR from the Member’s home landline phone and enters the required information to successfully record the clock out.
- c. The EVV system accurately captured the following information (per SDV-1P):
 - i. Member receiving the service
 - ii. Service Attendant providing the service
 - iii. PSO Business Unit for which the Service Attendant is performing the service on behalf
 - iv. Location where the service is delivered (home)
 - v. Date the service is performed
 - vi. Time the service is performed (start and end)
 - vii. Type of service performed (HCPCS/Modifiers and Service Group/Service Code, if applicable)
- d. The EVV system accurately captured the type of method used (Landline) .
- e. The text file the EVV system will submit to the EVV Aggregator contains the visit data for this scenario. The PSO must present this text file to the RR Team in the format the EVV system will use to transmit to the EVV Aggregator.

1.2. Home Landline – Without Schedule

Note: HHSC may waive this scenario if the PSO is not using the Landline Electronic Verification Method (Question 20 is No).

Demonstration Steps

1. **Data Setup in the EVV System:**

- a. Member with a home landline registered in the EVV System
- b. Service Attendant
- c. No scheduled visit

2. **System User demonstrates, and RR verifies that:**

- a. A Service Attendant calls the IVR from the Member's home landline phone and enters the required information to successfully record the clock in.
- b. A Service Attendant calls the IVR from the Member's home landline phone and enters the required information to successfully record the clock out.
- c. The EVV system accurately captured the following information (per SDV-1P):
 - i. Member receiving the service
 - ii. Service Attendant providing the service
 - iii. PSO Business Unit the Service Attendant is performing the service on behalf of
 - iv. Location where the service is delivered (home)
 - v. Date the service is performed
 - vi. Time the service is performed (start and end)
 - vii. Type of service performed (HCPCS/Modifiers and Service Group/Service Code, if applicable)
- d. The EVV system accurately captured the type of method used (Landline).
- e. The text file the EVV system will submit to the EVV Aggregator contains the visit data for this scenario. The PSO must present this text file to the RR Team in the format the EVV system will use to transmit to the EVV Aggregator.

2. EVM-4P

Business Rule

EVM-4P: ‘EVM System’ must verify home landline phone number on ‘EVM Visit Transaction’ is associated with ‘Member’ profile. If a mismatch is found, the transaction must be flagged, and the ‘System User’ alerted.

2.1. Home Landline – Call Using Different Number

Note: HHSC may waive this scenario if the PSO is not using the Landline Electronic Verification Method (Question 20 is No).

Demonstration Steps

1. Data Setup in the EVM System:

- a. Member with a home landline registered in the EVM System
- b. Service Attendant

2. System User demonstrates, and RR team validates that:

- a. A Service Attendant calls the IVR from a different phone (not the Member’s home landline phone) and enters the required information to successfully record the clock in.
- b. A Service Attendant calls the IVR from a different phone (not the Member’s home landline phone) and enters the required information to successfully record the clock out.
- c. The EVM System validates the phone number and alerts the System User that a number other than the Member’s registered home landline phone number was used for the clock-in and clock-out.

3. EVM-5P, SDV-12P, SDV-13P

Business Rules

EVM-5P: ‘Proprietary System Operator’ must provide ‘HHSC’-approved alternatives for clock-in/clock-out in the event a ‘Member’ does not have a landline, or a ‘Member’ is unwilling to allow ‘Service Attendant’ use of landline.

SDV-12P: ‘EVV System’ must auto-verify a service delivery transaction received via approved method (except ‘GUI’) that matches to a previously entered ‘Schedule’ when applicable.

SDV-13P: ‘EVV System’ must auto-verify a service delivery transaction received that matches Texas Medicaid EVV program criteria, in lieu of a ‘Schedule’, without the ‘System User’ performing ‘Visit Maintenance’.

3.1. Alternative Device – With Schedule

Note: HHSC may waive this scenario if the PSO is not using the Alternative Device Electronic Verification Method (Question 21 is No).

Demonstration Steps

1. Data Setup in the EVV System:

- a. Member with an alternative device registered in the EVV System
- b. Service Attendant
- c. Scheduled visit

2. System User demonstrates, and RR Team verifies that:

- a. A Service Attendant clocks in according to the schedule using the alternative device registered to the Member and writes down whatever information is needed.
- b. A Service Attendant calls into the EVV System to successfully record the clock in.
- c. A Service Attendant clocks out according to the schedule using the alternative device and writes down whatever information is needed.
- d. A Service Attendant calls into the EVV System to successfully record the clock out.
- e. The visit auto-verifies in the EVV system.
- f. The EVV system accurately captured the following information (per SDV-1P):
 - i. Member receiving the service
 - ii. Service Attendant providing the service
 - iii. PSO Business Unit the Service Attendant is performing the service on behalf of
 - iv. Location where the service is delivered (home)
 - v. Date the service is performed
 - vi. Time the service is performed (start and end)
 - vii. Type of service performed (HCPCS/Modifiers and Service Group/Service Code, if applicable)
- g. The EVV system accurately captured the type of method used (Alternative Device).
- h. The text file the EVV system will submit to the EVV Aggregator contains the visit data for this scenario. The PSO must present this text file to the RR Team in the format the EVV system will use to transmit to the EVV Aggregator.

3.2. Alternative Device – Without Schedule

Note: HHSC may waive this scenario if the PSO is not using the Alternative Device Electronic Verification Method (Question 21 is No).

Demonstration Steps

1. Data Setup in the EVV System:

- a. Member with an alternative device registered in the EVV System
- b. Service Attendant
- c. No scheduled visit

2. System User demonstrates, and RR Team verifies that:

- a. A Service Attendant clocks in using the alternative device registered to the Member and writes down whatever information is needed.
- b. A Service Attendant calls into the EVV System to successfully record the clock in.
- c. A Service Attendant clocks out using the alternative device and writes down whatever information is needed.
- d. A Service Attendant calls into the EVV System to successfully record the clock out.
- e. The EVV system accurately captured the following information (per SDV-1P):
 - i. Member receiving the service
 - ii. Service Attendant providing the service
 - iii. PSO Business Unit the Service Attendant is performing the service on behalf of
 - iv. Location where the service is delivered (home)
 - v. Date the service is performed
 - vi. Time the service is performed (start and end)
 - vii. Type of service performed (HCPCS/Modifiers and Service Group/Service Code, if applicable)
- f. The EVV system accurately captured the type of method used (Alternative Device) .
- g. The text file the EVV system will submit to the EVV Aggregator contains the visit data for this scenario. The PSO must present this text file to the RR Team in the format the EVV system will use to transmit to the EVV Aggregator.

4. EVM-6P

Business Rule

EVM-6P: ‘EVV System’ must identify a ‘Service Attendant’s use of alternative methods/devices used for clock-in/clock-out and confirm association to ‘Member’. If a mismatch is found, the transaction must be flagged, and the ‘System User’ alerted.

4.1. Alternative Device – Not Associated with Member

Note: HHSC may waive this scenario if the PSO is not using the Alternative Device Electronic Verification Method (Question 21 is No).

Demonstration Steps

1. Data Setup in the EVV System:

- a. Member with an alternative device registered in the EVV System
- b. Service Attendant

2. System User demonstrates, and RR Team verifies that:

- a. A Service Attendant clocks in using the alternative device associated with a different Member and writes down whatever information is needed.
- b. A Service Attendant calls into the EVV System and enters the required information.
- c. The EVV System validates that the alternative device is registered to the member and alerts the System User that a device other than the Member’s registered device was used for the clock-in.

5. EVM-7P, SDV-12P, SDV-13P

Business Rule

EVM-7P: ‘Proprietary System Operator’ must allow clock-in/clock-out via mobile methods. The mobile methods must be provided at no charge to the ‘Member’.

SDV-12P: ‘EVV System’ must auto-verify a service delivery transaction received via approved method (except ‘GUI’) that matches to a previously entered ‘Schedule’ when applicable.

SDV-13P: ‘EVV System’ must auto-verify a service delivery transaction received that matches Texas Medicaid EVV program criteria, in lieu of a ‘Schedule’, without the ‘System User’ performing ‘Visit Maintenance’.

5.1. Mobile Method – With Schedule

Note: HHSC may waive this scenario if the PSO is not using a Mobile Electronic Verification Method (Question 23 is No).

Demonstration Steps

1. Data Setup in the EVV System:

- a. Member with a mobile method registered in the EVV System
- b. Service Attendant
- c. Scheduled visit

2. System User demonstrates, and RR Team verifies that:

- a. A Service Attendant clocks in according to the schedule using the mobile method.
- b. A Service Attendant clocks out according to the schedule using the mobile method.
- c. The visit auto-verifies in the EVV system.
- d. The EVV system accurately captured the following information (per SDV-1P):
 - i. Member receiving the service
 - ii. Service Attendant providing the service
 - iii. Proprietary System Operator Business Unit the Service Attendant is performing the service on behalf of
 - iv. Location where the service is delivered in a community location (not the client’s home address)
 - v. GPS coordinates for a location other than the client’s home address
 - vi. Date the service is performed
 - vii. Time the service is performed (start and end)
 - viii. Type of service performed (HCPCS/Modifiers and Service Group/Service Code, if applicable)
- e. The EVV system has accurately captured the type of method used (Mobile Method) .
- f. The text file the EVV system will submit to the EVV Aggregator contains the visit data for this scenario. The PSO must present this text file to the RR Team in the format the EVV system will use to transmit to the EVV Aggregator.

5.2. Mobile Method – Without Schedule

Note: HHSC may waive this scenario if the PSO is not using the Mobile Electronic Verification Method (Question 23 is No).

Demonstration Steps

1. **Data Setup in the EVV System:**

- a. Member with a mobile method registered in the EVV System
- b. Service Attendant
- c. No scheduled visit

2. **System User demonstrates, and RR Team verifies that:**

- a. A Service Attendant clocks in using the mobile method.
- b. A Service Attendant clocks out using the mobile method.
- c. The EVV system accurately captured the following information (per SDV-1P):
 - i. Member receiving the service
 - ii. Service Attendant providing the service
 - iii. Proprietary System Operator Business Unit the Service Attendant is performing the service on behalf of
 - iv. Location where the service is delivered (home or community location, and correct ‘GPS’ coordinates)
 - v. Date the service is performed
 - vi. Time the service is performed (start and end)
 - vii. Type of service performed (HCPCS/Modifiers and Service Group/Service Code, if applicable)
- d. The EVV system has accurately captured the type of method used (Mobile Method).
- e. The text file the EVV system will submit to the EVV Aggregator contains the visit data for this scenario. The PSO must present this text file to the RR Team in the format the EVV system will use to transmit to the EVV Aggregator.

6. SDV-4P & SDV-48P

Business Rule

SDV-4P: ‘EVV System’ must allow for manual data entry of ‘EVV Visit Transactions’. All ‘EVV Visit Transactions’ entered using this manual method must identify the input method and output method as “GUI” (manual entry). ‘EVV System’ must require extra certification that supporting documentation is available when the visit is manually entered by the ‘System User’.

SDV-48P: ‘EVV System’ must require entry of a ‘Reason Code’ when changes are made to the service delivery transaction after the ‘System User’/‘Service Attendant’ has documented the visit.

6.1. Manually Entered Visit Transaction (GUI)

Demonstration Steps

1. Data Setup in the EVV System:

- a. Member
- b. Service Attendant
- c. Scheduled visit

2. System User demonstrates, and RR Team verifies that:

- a. A Service Attendant fails to clock in and fails to clock out (did not use EVV).
- b. The System User manually enters the visit transaction as follows:
 - i. Enters all required visit data
 - ii. Enters Reason Code 600 (Other)
 - iii. Enters Free Text and as required by this Reason Code it must include:
 1. Why the use of this reason code was required and document any missing actual clock in or clock out time not electronically captured by the EVV system.
- c. The EVV System accepts the visit transaction.
- d. The EVV system accurately captured the following information (per SDV-1P):
 - i. Member receiving the service
 - ii. Service Attendant providing the service
 - iii. Proprietary System Operator Business Unit the Service Attendant is performing the service on behalf of
 - iv. Location where the service is delivered (home or community location)
 - v. Date the service is performed
 - vi. Time the service is performed (start and end)
 - vii. Type of service performed (HCPCS/Modifiers and Service Group/Service Code, if applicable)
- e. The EVV system accurately captured the following information :
 - i. Type of method used to clock in (GUI)
 - ii. Type of method used to clock out (GUI)
 - iii. Certification that supporting documentation is available
 - iv. Reason Code 600 (Other) and Free text in the comment field including the check-in and check-out time.

- f. The text file the EVV system will submit to the EVV Aggregator contains the visit data for this scenario. The PSO must present this text file to the RR Team in the format the EVV system will use to transmit it to the EVV Aggregator.

7. SDV-7P

Business Rule

SDV-7P: ‘EVV System’ must allow the ‘System User’ the ability to adjust billed hours in cases where ‘Service Attendant’ clock-in/clock-out were not appropriate. The billed hours may not be adjusted by the ‘System User’ to an amount greater than the actual hours recorded by the ‘EVV System’.

7.1. Adjust Bill Hours – Greater Than Actual Hours

Demonstration Steps

1. **Data Setup in the EVV System:**
 - a. Member
 - b. Service Attendant
 - c. Scheduled visit
 - d. Service Attendant clocked in and clocked out for a visit one (1) hour in duration
2. **System User demonstrates, and RR Team validates that:**
 - a. System User performs the following visit maintenance on the visit transaction created in step #1:
 - i. Enters a value of two (2) hours in the bill hours field within the EVV System (one hour greater than the actual hours captured in the EVV System)
 - ii. Enters one or more Reason Code number and description, with or without additional comments
 - b. EVV System does not accept the changes to the visit transaction (even if the System User was able to enter the data).
 - c. System User demonstrates, and RR Team validates, that the EVV system does not record the visit .

7.2. Adjust Bill Hours – Less Than Actual Hours

Demonstration Steps

1. **Data Setup in the EVV System:**
 - a. Member
 - b. Service Attendant
 - c. Scheduled visit
 - d. Service Attendant clocked in and clocked out for a visit of two hours in duration
2. **System User demonstrates, and RR Team verifies that:**
 - a. A System User can perform the following visit maintenance on the visit transaction created in step #1:
 - i. Enters a value of one (1) hour in the bill hours field within the EVV System (one (1) hour less than the actual hours captured in the EVV System)
 - ii. Enters Reason Code 100 (Service Variation) and Reason Code Description “B - Downward adjustment of pay hours.”
 - iii. Enters required free text comments

- b. The EVV System accepts the changes to the visit transaction.
- c. The EVV system has accurately captured the following information :
 - i. Bill hours amount equals one (1) hour
 - ii. Reason Code number 100 and description “B - Downward adjustment of pay hours.” and additional comments
- d. The text file the EVV system will submit to the EVV Aggregator contains the changed bill hours within the visit data for this scenario. The PSO must present this text file to the RR Team in the format the EVV system will use to transmit it to the EVV Aggregator.

8. SDV-19P, SDV-49P, SDV-50P

Business Rules & Policy References

SDV-19P: ‘EVV System’ must adhere to the HHSC EVV Policy Handbook in regard to ‘Call Matching Window’.

EVV Policy Reference

The call matching window is set at 24 hours to match to a schedule. Any clock-in and clock-out between 12 a.m. and 11:59 p.m., on the same date of a scheduled visit, with **no other exceptions**, will auto-verify to the planned schedule provided that the rounded pay hours match the scheduled duration.

SDV-49P: ‘EVV System’ must adhere to the HHSC EVV Policy Handbook in regard to ‘Optional Expanded Time for Auto-Verification’ if the ‘Proprietary System Operator’ chooses to implement this optional ‘Visit Maintenance’ reduction solution.

EVV Policy Reference

Optional Expanded Time for Auto-Verification: This optional solution extends the auto-verified timeframe by .25 rounded hours. If the rounded pay hours are equal to the scheduled hours plus .25 rounded hours (plus 22 minutes), and no other exceptions exist, the calls will auto-verify and log the rounded pay hours. Otherwise, visit maintenance is required.

SDV-50P: ‘EVV System’ must adhere to the HHSC EVV Policy Handbook in regard to ‘Optional Automatic Downward Adjustment’ if the ‘Proprietary System Operator’ chooses to implement this optional ‘Visit Maintenance’ reduction solution.

EVV Policy Reference:

Optional Automatic Downward Adjustment: This is an optional solution designed to automatically adjust pay hours downward to match the planned scheduled hours. This prevents issues with pay hours exceeding the weekly-authorized hours. This adjustment only applies to what the payer is billed and not what should be paid to the attendant. This optional feature is only available if the provider selects the Optional Expanded Time for Auto-Verification.

8.1. Auto-Verify – Call Matching Window

Demonstration Steps

1. **Data Setup in the EVV System:**

- a. Member
- b. Service Attendant
- c. Call Matching Window policy is in effect with no other Visit Maintenance reduction options enabled in the EVV System.
- d. Scheduled visit for 10 AM to Noon (2 hours in duration)
- e. The Service Attendant clocked in at 8 AM and clocked out at 10:07 AM (total hours worked 2 hours and 7 minutes)

2. **System User demonstrates, and RR Team verifies that:**

- a. The EVV system automatically rounded down the total duration of the visit hours to 2 bill hours (the system rounds down if seven minutes or less).

- b. The rounded bill hours match the scheduled visit duration.
- c. The EVV system auto-verifies the visit transaction (ready to transmit to the EVV Aggregator without user intervention).
- d. The text file the EVV system will submit to the EVV Aggregator contains the visit data for this scenario. The PSO must present this text file to the RR Team in the format the EVV system will use to transmit to the EVV Aggregator.

8.2. No-Auto-Verify – Call Matching Window

Demonstration Steps

1. Data Setup in the EVV System:

- a. Member
- b. Service Attendant
- c. Call Matching Window policy is in effect with no other Visit Maintenance reduction options enabled in the EVV System.
- d. Scheduled visit for 10 AM to Noon (2 hours in duration)
- e. The Service Attendant clocked in at 8 AM and clocked out at 10:08 AM (total hours worked 2 hours and 8 minutes)

2. System User demonstrates, and RR Team verifies that:

- a. The EVV system automatically rounded up the total duration of the visit to 2.25 (the system rounds up if eight minutes or more) actual hours and pre-populates bill hours with 2.25.
- b. The EVV system does not auto-verify the visit transaction since the rounded actual hours (2.25) do not match the scheduled visit duration (2 hours) requiring user intervention.
- c. The System User confirms the visit as the correct hours worked.
- d. The System User enters Reason Code 100-A *Staff hours worked differ from schedule* (thus retaining the 2.25 hours).
- e. The text file the EVV system will submit to the EVV Aggregator contains the visit data for this scenario with bill hours as 2.25. The PSO must present this text file to the RR Team in the format the EVV system will use to transmit to the EVV Aggregator.

8.3. Auto-Verify – Expanded Time for Auto-verification

Note: HHSC may waive this scenario if the PSO has indicated they do not wish to use this Optional Visit Maintenance Reduction option (Question 11 is No).

Demonstration Steps

1. Data Setup in the EVV System:

- a. Member
- b. Service Attendant
- c. Expanded Time for Auto-Verification Visit Maintenance reduction option is enabled in the EVV System with no other options enabled.
- d. Scheduled visit for 1 PM to 3 PM (2 hours in duration).
- e. Due to the Call Matching Window policy the Service Attendant can clock in and out anytime between 12 a.m. - 11:59 p.m.

- i. Service Attendant clocks in and out for a total duration of 2 hours and 11 minutes.
- 2. System User demonstrates, and RR Team verifies that:**
 - a. The EVV system automatically rounded up the total duration of the visit to 2.25 (the system rounds up if eight minutes or more) actual hours and pre-populates bill hours with 2.25.
 - b. The EVV system auto-verifies the visit transaction due to the enabling of the Expanded Time for Auto-Verification option.
 - c. The text file the EVV system will submit to the EVV Aggregator contains the visit data for this scenario with bill hours as 2.25. The PSO must present this text file to the RR Team in the format the EVV system will use to transmit to the EVV Aggregator.

8.4. Auto-Verify – Automatic Downward Adjustment Option Enabled

Note: HHSC may waive this scenario if the PSO has indicated they do not wish to use this Optional Visit Maintenance Reduction option (Question 12 is No).

Demonstration Steps

- 1. Data Setup in the EVV System:**
 - a. Member
 - b. Service Attendant
 - c. Automatic Downward Adjustment Visit Maintenance reduction option is enabled in the EVV System.
 - d. Expanded Time for Auto-Verification Visit Maintenance reduction option is enabled in the EVV System.
 - e. Scheduled visit for 8 AM to Noon (4 hours in duration).
 - f. Due to the Call Matching Window policy the Service Attendant can clock in and out anytime between 12 a.m. - 11:59 p.m. on the date of service.
 - i. Service Attendant clocks in and out for a total duration of 4 hours and 22 minutes.
- 2. System User demonstrates, and RR Team verifies that:**
 - a. The EVV system automatically downward adjusted to the 4-hour planned schedule instead of the rounded 4.25 and pre-populates bill hours with 4 hours.
 - b. The EVV system auto-verifies the visit transaction due to the enabling of the Expanded Time for Auto-Verification option and the Automatic Downward Adjustment options.
 - c. The text file to be submitted to the EVV Aggregator contains the visit data for this scenario with bill hours as 4. The PSO must present this text file to the RR Team in the format the EVV system will use to transmit to the EVV Aggregator.

9. SDV-20P

Business Rule

SDV-20P: ‘EVV System’ must allow the ‘System User’ to complete ‘Visit Maintenance’ for a period of time specified in the HHSC EVV Policy Handbook. ‘Visit Maintenance’ outside of the specified time period may be performed only after receiving payer approval.

9.1. Visit Maintenance – Within Allowed Timeframe

Demonstration Steps

1. Data Setup in the EVV System:

- a. Completed visit transaction in the EVV System with a duration (actual hours) of 3 hours and a date of service 59 days in the past (calculated as demonstration date minus 59 days)

2. System User demonstrates, and RR Team verifies:

- a. The System User performs the following visit maintenance in the EVV System:
 - i. Entry of two (2) bill hours (one (1) hour less than the actual hours (3))
 - ii. Entry of the Reason Code 100 B with additional comments
- b. The EVV System accepts the changes to the visit transaction and accurately captures the following information:
 - i. Bill hours is equal to two (2) hours
 - ii. Reason Code 100 B and additional comments
 - iii. Last Visit Maintenance date is equal to the demonstration date
- c. The text file the EVV system will submit to the EVV Aggregator contains the visit data for this scenario. The PSO must present this text file to the RR Team in the format the EVV system will use to transmit to the EVV Aggregator.

9.2. Visit Maintenance – Outside Allowed Timeframe

Demonstration Steps

1. Data Setup in the EVV System:

- a. Completed visit transaction in the EVV System with:
 - i. A date of service 61 days in the past (calculated as demonstration date minus 61 days).
 - ii. Clock in and clock out for 3 actual hours in duration
 - iii. Bill hours equal to 2 hours

2. System User demonstrates, and RR team validates that:

- a. A System User attempts to perform the visit maintenance.
- b. The EVV System does not allow visit maintenance to be performed on the visit due to the date of service being more than 60 days in the past.
- c. The EVV system presents a message to the System User instructing how to obtain Payer Approval.

9.3. Visit Maintenance – Outside Allowed Timeframe with Payer Approval

Demonstration Steps

1. Data Setup in the EVV System:

- a. Completed visit transaction in the EVV System with:
 - i. A duration of 4 hours and
 - ii. A date of service at least 61 days in the past

2. System User demonstrates, and RR Team verifies that:

- a. A System User attempts to perform visit maintenance but is unable to do so because the date of service is outside the allowed visit maintenance timeframe.
- b. The PSO follows the procedure for requesting a Visit Maintenance unlock from the payer for that visit.
 - i. See the Visit Maintenance Unlock Request Policy at this location:
<https://hhs.texas.gov/sites/default/files/documents/doing-business-with-hhs/providers/long-term-care/evv/evv-visit-maintenance-unlock-request-policy.pdf>
- c. The PSO receives Payer approval to perform visit maintenance on that visit transaction
- d. EVV System is updated to reflect approval from the Payer and the visit is unlocked for Visit Maintenance.
- e. System User performs the following visit maintenance:
 - i. Enters three (3) bill hours in the EVV System which is one (1) hour less than the actual hours (4) captured in the EVV System
 - ii. Entry of 100 B Reason Code ‘Service Variation – Downward adjustment of pay hours’ and comments to explain the reason for using this Reason Code.
- f. The EVV System accepts the changes to the visit transaction.
- g. The EVV system accurately captured the following information:
 - i. Payer approval to perform visit maintenance
 - ii. Modified bill hours to three (3) hours
 - iii. Reason Code 100 B and comments
- h. The text file to be submitted to the EVV Aggregator contains the visit data for this scenario. The PSO must present this text file to the RR Team in the format the EVV system will use to transmit it to the EVV Aggregator.

10. SDV-21P

Business Rule

SDV-21P: ‘EVV System’ must restrict the ‘System User’ from performing ‘Visit Maintenance’ on the following fields at a minimum:

- Actual service delivery date
- Actual service delivery clock-in time
- Actual service delivery clock-out time
- Actual hours worked
- Auto-populated data fields
- ‘GPS’ coordinates

10.1. Visit Maintenance – Unable to Change Restricted Fields

Demonstration Steps

1. **Data Setup in the EVV System:**
 - a. Completed visit transaction in the EVV System with a date of service no more than 59 days in the past.
2. **System User demonstrates, and RR team verifies that:**
 - a. The System User opens the visit transaction for visit maintenance, but is unable to save changes to any of the following data:
 - i. Actual service delivery date
 - ii. Actual service delivery clock-in time
 - iii. Actual service delivery clock-out time
 - iv. Actual hours worked
 - v. GPS coordinates (when mobile method is used)

11. SDV-46P

Business Rule

SDV-46P: ‘EVV System’ must identify the input method as “GUI” when the clock in time for an ‘EVV Visit Transaction’ is missing (missed clock in) and later manually entered.

11.1 Missed Clock In (GUI)

Demonstration Steps

1. Data Setup in the EVV System:

- a. Member
- b. Service Attendant
- c. Scheduled visit

2. System User demonstrates, and RR Team verifies that:

- a. A Service Attendant does not clock in or clock out due to technical issues.
- b. A System User manually creates a visit in the EVV System based on verification of the visit with the Attendant.
- c. The EVV System accepts the visit transaction.
- d. The EVV system has accurately captured the following information:
 - i. Clock in time
 - ii. Type of method used to clock in (GUI)
 - iii. Clock out time
 - iv. Type of method used to clock out (GUI)
- e. Reason Code number 300F (300 Technical Issues; F - Malfunctioning mobile device/application).
 - i. The EVV system requires Comments, and the System User must document any missing actual clock in or clock out time not electronically captured by the EVV system.
- f. The text file the EVV system will submit to the EVV Aggregator contains the visit data for this scenario. The PSO must present this text file to the RR Team in the format the EVV system will use to transmit it to the EVV Aggregator.

12. SDV-47P

Business Rule

SDV-47P: ‘EVV System’ must identify the input method as “GUI” when the clock out time for an ‘EVV Visit Transaction’ is missing (missed clock out) and later manually entered.

12.1. Missed Clock Out (GUI)

Demonstration Steps

1. Data Setup in the EVV System:

- a. Member
- b. Service Attendant
- c. Scheduled visit
- d. Service Attendant clocked in according to the schedule
- e. Service Attendant failed to clock out
- f. The EVV system records the visit as unverified requiring the System User to perform visit maintenance.

2. System User demonstrates, and RR Team verifies:

- a. The following visit maintenance:
 - i. Entry of the missed clock out time
 - ii. Entry of Reason Code 900 B ‘Failure to call-out’ with additional comments. The System User must document any missing actual clock out time that the EVV system did not electronically captured.
 - iii. EVV System accepts the changes to the visit transaction.
- b. The EVV system accurately captured the following information:
 - i. Clock in time
 - ii. Type of method used to clock in
 - iii. Clock out time
 - iv. Type of method used to clock out (GUI)
 - v. Reason Code 900 B with additional comments
- c. The text file the EVV system will submit to the EVV Aggregator contains the visit data for this scenario. The PSO must present this text file to the RR Team in the format the EVV system will use to transmit to the EVV Aggregator.

13. SDV-56P

Business Rule

SDV-56P: 'EVV System' must update the last visit maintenance date in the 'EVV Visit Transaction' to the current date, whenever a change to one or more fields identified as impacting the last visit maintenance date in the HHSC EVV Policy Handbook are saved to the 'EVV Visit Transaction' after the 'System User'/'Service Attendant' has documented the visit.

The PSO must demonstrate each scenario separately (no other changes will be made to the visit transaction, except to enter a Reason Code number and description) to verify that changing that specific field caused the visit maintenance date to change.

13.1. Visit Maintenance Date – NPI Updated

Note: HHSC may waive this scenario if the EVV System prevents updates to the NPI during Visit Maintenance.

Demonstration Steps

1. **Data Setup in the EVV System:**
 - a. Visit transactions previously accepted by the Data Aggregator
2. **System User demonstrates, and RR Team verifies:**
 - a. The following visit maintenance actions:
 - i. An update to the visit transaction field: NPI (labeled PROVIDE_NPI on the visit transaction record for the EVV Aggregator)
 - ii. Entry of one or more Reason Code number and description, with or without additional comments
 - b. EVV System accepts the changes to the visit transaction.
 - c. Last Visit maintenance date matches the current date (the date of demonstration)
 - d. The text file the EVV system will submit to the EVV Aggregator contains the visit data for each scenario in #14 with the Last Visit Maintenance Date updated with the date of the demonstration. The PSO must present this text file to the RR Team in the format the EVV system will use to transmit to the EVV Aggregator.

13.2. Visit Maintenance Date – API Updated

Note: HHSC may waive this scenario if the EVV System prevents updates to the API during Visit Maintenance.

Demonstration Steps

1. **Data Setup in the EVV System:**
 - a. Visit transactions previously accepted by the Data Aggregator
2. **System User demonstrates, and RR Team verifies:**
 - a. The following visit maintenance actions:

- i. An update to the visit transaction field API (labeled PROVIDER_API on the visit transaction for the EVV Aggregator)
 - ii. Entry of one or more Reason Code number and description, with or without additional comments
- b. EVV System accepts the changes to the visit transaction.
- c. Last Visit maintenance date matches the current date (the date of demonstration)
- d. The text file to be submitted to the EVV Aggregator contains the visit data for each scenario in #14 with the Last Visit Maintenance Date updated with the date of the demonstration. The PSO must present this text file to the RR Team in the format the EVV system will use to transmit it to the EVV Aggregator.

13.3. Visit Maintenance Date – Contract Number Updated

Note: HHSC may waive this scenario if the EVV System prevents updates to the Contract Number during Visit Maintenance.

Demonstration Steps

- 1. Data Setup in the EVV System:**
 - a. Visit transactions previously accepted by the Data Aggregator
- 2. System User demonstrates, and RR Team verifies:**
 - a. The following visit maintenance actions:
 - i. An update to the visit transaction field Contract Number (labeled PROVIDER_CONTRACTNUMBER on the visit transaction for the EVV Aggregator)
 - ii. Entry of one or more Reason Code number and description, with or without additional comments
 - b. EVV System accepts the changes to the visit transaction.
 - c. Last Visit maintenance date matches the current date (the date the demonstration was performed)
 - d. The text file to be submitted to the EVV Aggregator contains the visit data for each scenario in #14 with the Last Visit Maintenance Date updated with the date of the demonstration. The PSO must present this text file to the RR Team in the format the EVV system will use to transmit it to the EVV Aggregator.

13.4. Visit Maintenance Date – Medicaid Id Updated

Note: HHSC may waive this scenario if the EVV System prevents updates to the Medicaid Id during Visit Maintenance.

Demonstration Steps

1. **Data Setup in the EVV System:**
 - a. Visit transactions previously accepted by the Data Aggregator
2. **System User demonstrates, and RR Team verifies:**
 - a. The following visit maintenance actions:
 - i. An update to the visit transaction field Medicaid Id (labeled INDVMBR_MEDICAIDID on the visit transaction for the EVV Aggregator)
 - ii. Entry of one or more Reason Code number and description, with or without additional comments
 - b. EVV System accepts the changes to the visit transaction.
 - c. Last Visit maintenance date matches the current date (the date the demonstration was performed)
 - d. The text file to be submitted to the EVV Aggregator contains the visit data for each scenario in #14 with the Last Visit Maintenance Date updated with the date of the demonstration. The PSO must present this text file to the RR Team in the format the EVV system will use to transmit it to the EVV Aggregator.

13.5. Visit Maintenance Date – Service Group Updated

Note: HHSC may waive this scenario if the EVV System prevents updates to the Long-Term Care (LTC) Service Group field during Visit Maintenance or does not deliver LTC services.

Demonstration Steps

1. **Data Setup in the EVV System:**
 - a. Visit transactions previously accepted by the Data Aggregator
2. **System User demonstrates, and RR Team verifies:**
 - a. The following visit maintenance actions:
 - i. An update to the visit transaction field Contract Number (Service Group (labeled VISIT_SVCGRP on the visit transaction for the EVV Aggregator)
 - ii. Entry of one or more Reason Code number and description, with or without additional comments
 - b. EVV System accepts the changes to the visit transaction.
 - c. Last Visit maintenance date matches the current date (the date the demonstration was performed)
 - d. The text file to be submitted to the EVV Aggregator contains the visit data for each scenario in #14 with the Last Visit Maintenance Date updated with the date of the demonstration. The PSO must present this text file to the RR Team in the format the EVV system will use to transmit it to the EVV Aggregator.

13.6. Visit Maintenance Date – Service Code Updated

Note: HHSC may waive this scenario if the EVV System prevents updates to the Long-Term Care (LTC) Service Code field during Visit Maintenance or does not deliver LTC services.

Demonstration Steps

1. Data Setup in the EVV System:

- a. Visit transactions previously accepted by the Data Aggregator

2. System User demonstrates, and RR Team verifies:

- a. The following visit maintenance actions:
 - i. An update to the visit transaction field Service Code (labeled EVV_SVCCODE on the visit transaction for the EVV Aggregator)
 - ii. Entry of one or more Reason Code number and description, with or without additional comments
- b. EVV System accepts the changes to the visit transaction.
- c. Last Visit maintenance date matches the current date (the date the demonstration was performed)
- d. The text file the EVV system will submit to the EVV Aggregator contains the visit data for each scenario in #14 with the Last Visit Maintenance Date updated with the date of the demonstration. The PSO must present this text file to the RR Team in the format the EVV system will use to transmit it to the EVV Aggregator.

13.7. Visit Maintenance Date – HCPCS Code Updated

Note: HHSC may waive this scenario if the EVV System prevents updates to the HCPCS code during Visit Maintenance.

Demonstration Steps

1. Data Setup in the EVV System:

- a. Visit transactions previously accepted by the Data Aggregator

2. System User demonstrates, and RR Team verifies:

- a. The following visit maintenance actions:
 - i. An update to the visit transaction field HCPCS Code (labeled EVV_HCPCS_CODE on the visit transaction for the EVV Aggregator)
 - ii. Entry of one or more Reason Code number and description, with or without additional comments
- b. EVV System accepts the changes to the visit transaction.
- c. Last Visit maintenance date matches the current date (the date the demonstration was performed)
- d. The text file to be submitted to the EVV Aggregator contains the visit data for each scenario in #14 with the Last Visit Maintenance Date updated with the date of the demonstration. The PSO must present this text file to the RR Team in the format the EVV system will use to transmit it to the EVV Aggregator.

13.8. Visit Maintenance Date – HCPCS Modifier Updated

Note: HHSC may waive this scenario if the EVV System prevents updates to the HCPCS Modifier code during Visit Maintenance.

Demonstration Steps

1. **Data Setup in the EVV System:**
 - a. Visit transactions previously accepted by the Data Aggregator
2. **System User demonstrates, and RR Team verifies:**
 - a. The following visit maintenance actions:
 - i. An update to the visit transaction field HCPCS Modifier (labeled EVV_MODIFIER on the visit transaction for the EVV Aggregator)
 - ii. Entry of one or more Reason Code number and description, with or without additional comments
 - b. EVV System accepts the changes to the visit transaction.
 - c. Last Visit maintenance date matches the current date (the date the demonstration was performed)
 - d. The text file to be submitted to the EVV Aggregator contains the visit data for each scenario in #14 with the Last Visit Maintenance Date updated with the date of the demonstration. The PSO must present this text file to the RR Team in the format the EVV system will use to transmit it to the EVV Aggregator.

13.9. Visit Maintenance Date – Bill Hours Updated

Demonstration Steps

1. **Data Setup in the EVV System:**
 - a. Visit transactions previously accepted by the Data Aggregator
2. **System User demonstrates, and RR Team verifies:**
 - a. The following visit maintenance actions:
 - i. An update to the visit transaction field Bill Hours (labeled EVV_PAYHOURS on the visit transaction for the EVV Aggregator)
 - ii. Entry of one or more Reason Code number and description, with or without additional comments
 - b. EVV System accepts the changes to the visit transaction.
 - c. Last Visit maintenance date matches the current date (the date the demonstration was performed)
 - d. The text file to be submitted to the EVV Aggregator contains the visit data for each scenario in #14 with the Last Visit Maintenance Date updated with the date of the demonstration. The PSO must present this text file to the RR Team in the format the EVV system will use to transmit it to the EVV Aggregator.

13.10. Visit Maintenance Date – Number of Units Updated

Demonstration Steps

1. Data Setup in the EVV System:

- a. Visit transactions that have been previously accepted by the Data Aggregator

2. System User demonstrates, and RR Team verifies:

- a. The following visit maintenance actions:
- i. An update to the visit transaction field Number of Units (labeled EVV_UNITS on the visit transaction for the EVV Aggregator)
 - ii. Entry of one or more Reason Code number and description, with or without additional comments
- b. EVV System accepts the changes to the visit transaction.
- c. Last Visit maintenance date matches the current date (the date of the demonstration)
- d. The text file to be submitted to the EVV Aggregator contains the visit data for each scenario in #14 with the Last Visit Maintenance Date updated with the date of the demonstration. The PSO must present this text file to the RR Team in the format the EVV system will use to transmit it to the EVV Aggregator.

13.11. Visit Maintenance Date – Reason Code Only

Demonstration Steps

1. Data Setup in the EVV System:

- a. Visit transaction transmitted to the Data Aggregator
- b. Visit maintenance date on the visit transaction is prior to the current date

2. System User demonstrates, and RR Team verifies:

- a. The following visit maintenance:
- i. Enters one Reason Code number and description, with or without additional comments
 - ii. No other changes made to the visit transaction
 - iii. EVV System accepts the changes to the visit transaction.
- b. The following information has been captured accurately in the EVV System:
- i. One Reason Code number and description (entered in step #2), with or without additional comments
 - ii. Visit maintenance date matches the current date (the date steps 2 and 3 were performed)
- c. The text file to be submitted to the EVV Aggregator containing the visit data for each scenario in #14 to confirm that the Last Visit Maintenance Date has been updated with the current date. The PSO must present this text file to the RR Team in the format as it will be transmitted to the EVV Aggregator.

13.12. Visit Maintenance Date – No Visit Maintenance Fields Updated

Demonstration Steps

1. Data Setup in the EVV System:

- a. Visit transaction transmitted to the Data Aggregator
- b. No visit maintenance date on the visit transaction

2. System User demonstrates, and RR Team verifies:

- a. The following Visit Maintenance:
 - i. User updates one or more fields on the visit transaction, none of which are the fields that cause the visit maintenance date to change (identified in demonstrations 14.1 through 14.11 above)
 - ii. User makes no other changes to the visit transaction
 - iii. EVV System accepts the changes to the visit transaction.
- b. That the EVV system has accurately captured the following information:
 - i. The EVV system saved changes made to the field(s) updated in step 2a
 - ii. The EVV system did not change the visit maintenance date to the current date (the date steps 2.a were performed)
- c. The text file the EVV system will submit to the EVV Aggregator containing the visit data for each scenario in #14 to confirm that the EVV system updated the Last Visit Maintenance Date to equal the current date. The PSO must present this text file to the RR Team in the format the EVV system will transmit it to the EVV Aggregator.

14. SDV-53P

Business Rule

SDV-53P: ‘EVV System’ must use bill time in and bill time out, when entered, to calculate billed hours in the same manner as actual service delivery time is calculated.

14.1. Enter Bill Time to Calculate Bill Hours with Schedule

Note: HHSC may waive this scenario if the PSO has made a business decision to not implement the fields ‘bill time in’ and ‘bill time out’.

Demonstration Steps

1. **Data Setup in the EVV System:**
 - a. Member
 - b. Service Attendant
 - c. Scheduled visit with a duration of 3 hours
 - d. Service Attendant clocked in
 - e. Service Attendant clocks out in error one hour longer than the scheduled duration (4 hours)
2. **System User demonstrates, and RR team verifies:**
 - a. The following visit maintenance to calculate the bill hours in the EVV System:
 - i. Enters the clock in time into the bill time in field and correct clock out into the bill time out field
 - ii. Enters the calculated value into the bill hours (unless the EVV System has pre-populated the field for the System User)
 - iii. Enters one or more Reason Code number and description
 - iv. Enters a comment to document the time in and time out
 - v. EVV System accepts the changes to the visit transaction.
 - b. The EVV system accurately captures the following information:
 - i. Bill time in and bill time out
 - ii. Rounded bill hours (based on the bill times entered) per HHSC EVV Policy
 - iii. One or more Reason Code number and description, with a comment to document the bill time out (this satisfies the demonstration requirement for SDV-48P)
 - iv. Last Visit maintenance date matches the current date
 - c. The text file to be submitted to the EVV Aggregator to confirm that the bill time in and bill time out values are not included in the record and bill hours is the calculated value from bill time in and bill time out. The PSO must present this text file to the RR Team in the format the EVV system will use to transmit it to the EVV Aggregator.

14.2. Enter Bill Time to Calculate Bill Hours without Schedule

Note: HHSC may waive this scenario if the PSO has made a business decision to not implement the fields ‘bill time in’ and ‘bill time out’.

Demonstration Steps

1. **Data Setup in the EVV System:**

- a. Member
- b. Service Attendant
- c. Service Attendant clocked in
- d. Service Attendant clocks out for a 3-hour visit. It was determined through a manual process that the clock out was in error and should have been a 2-hour visit.

2. **System User demonstrates, and RR team verifies:**

- a. The following visit maintenance to calculate the bill hours in the EVV System:
 - i. Enters the clock in into the bill time in field and correct clock out into the bill time out field
 - ii. Enters the calculated value into the bill hours (unless the EVV System has pre-populated the field for the System User)
 - iii. Enters one or more Reason Code number and description
 - iv. Enters a comment to document the time in and time out
 - v. EVV System accepts the changes to the visit transaction.
- b. The EVV system has accurately captured the following information:
 - i. Bill time in and bill time out
 - ii. Rounded bill hours (based on the bill times entered) per HHSC EVV Policy
 - iii. One or more Reason Code number and description, with a comment to document the bill time out (this satisfies the demonstration requirement for SDV-48P)
 - iv. Last Visit maintenance date matches the current date
- c. The text file the EVV system will submit to the EVV Aggregator to confirm that the bill time in and bill time out values are not included in the record and bill hours is the calculated value from bill time in and bill time out. The PSO must present this text file to the RR Team in the format the EVV system will use to transmit it to the EVV Aggregator.

15. VSS-5P

Business Rule

VSS-5P: ‘EVV System’ must provide read-only access to ‘HHSC’ and ‘MCO’ staff to view the same information that the ‘System User’ can access and view. The EVV system must limit ‘MCO’ access to view only the data of their ‘Members’.

15.1 HHSC Read-Only Access

Demonstration Steps:

15.1.1 HHSC Read-Only Access – PSO Business Unit Profiles

1. **Data Setup in the EVV System:**
 - a. System Administrator creates an account as an HHSC user
2. **System User demonstrates, and RR Team validates that:**
 - a. System Administrator logs into the EVV System as an HHSC user
 - b. The HHSC user has read-only access in the EVV System to view all PSO business unit profiles.

15.1.2 HHSC Read-Only Access – Member Profiles

1. **Data Setup in the EVV System:**
 - a. System Administrator creates an account as an HHSC user
2. **System User demonstrates, and RR Team validates that:**
 - a. System Administrator logs into the EVV System as an HHSC user
 - b. The HHSC user has read-only access in the EVV System to view all Member profiles.

15.1.3 HHSC Read-Only Access – Service Attendant Profiles

1. **Data Setup in the EVV System:**
 - a. System Administrator creates an account as an HHSC user
2. **System User demonstrates, and RR Team validates that:**
 - a. System Administrator logs into the EVV System as an HHSC user
 - b. The HHSC user has read-only access in the EVV System to view all Service Attendant profiles.

15.1.4 HHSC Read-Only Access – Schedules

1. **Data Setup in the EVV System:**
 - a. System Administrator creates an account as an HHSC user
2. **System User demonstrates, and RR Team validates that:**
 - a. System Administrator logs into the EVV System as an HHSC user
 - b. The HHSC user has read-only access in the EVV System to view all schedules.

15.1.5 HHSC Read-Only Access – Authorizations

1. Data Setup in the EVV System:

- a. System Administrator creates an account as an HHSC user

2. System User demonstrates, and RR Team validates that:

- a. System Administrator logs into the EVV System as an HHSC user
- b. The HHSC user has read-only access in the EVV System to view all authorizations.

15.1.6 HHSC Read-Only Access – Visit Transactions

1. Data Setup in the EVV System:

- a. System Administrator creates an account as an HHSC user

2. System User demonstrates, and RR Team validates that:

- a. System Administrator logs into the EVV System as an HHSC user
- b. The HHSC user has read-only access in the EVV System to view all visit transactions.

15.1.7 HHSC Read-Only Access – Standard System Reports

The Service Delivery Exception Report must be generated by **all** Proprietary Systems. HHSC may waive standard reports according to the PSO Detailed Questionnaire responses listed below:

Question 2 has FMSA or Both checked, indicating the CDS business rules apply and the following reports:

- EVV System must request these CDS Employer reports from the EVV Aggregator web service:
 - EVV Attendant History Report
 - EVV Clock-In/Clock-Out Usage Report
 - EVV Reason Code Usage and Free Text Report
 - EVV Units of Service Summary Report
- EVV System must create this report CDS Employer report using data stored within the system:
 - EVV CDS Service Delivery Log

Question 20 is Yes, the PSO will be using a Landline Electronic Visit Verification Method.

- EVV System must create this report within the EVV Proprietary System:
 - EVV Landline Phone Verification Report

Question 8 is Yes, Service Attendants or CDS employees deliver non-EVV services.

- EVV System must create this report within the EVV Proprietary System:
 - Non-EVV Relevant Time Logged

15.2. MCO Read-Only Access

15.2.1 MCO Read-Only Access – PSO Business Unit Profiles

Note: For PSO business unit profiles, the EVV system must limit access to the business units for which the MCO is the payer and further limit access to only the dates of service when the MCO was the payer for that business unit.

Demonstration Steps

1. Data Setup in the EVV System:

- a. System Administrator creates an account in the EVV System for two MCO users.
- b. PSO business unit profile(s) associated with one MCO.

2. System User demonstrates, and RR Team validates that:

- a. MCO System User logs into the EVV System as one of the two MCOs with whom the PSO business unit has a contract.
- b. MCO System User can view the PSO business unit profile(s) that is associated with the MCO.
- c. MCO System User logs into the EVV System as the MCO who does not have an association with the PSO business unit.

15.2.2 MCO Read-Only Access – Member Profiles

Note: The EVV system must limit access to the Member profile for the dates when an MCO was the payer. If a Member changes MCO payers, the EVV system must limit the previous and new MCO to viewing data only for the dates for when the individual was a member.

Demonstration Steps

1. Data Setup in the EVV System:

- a. Two MCO user accounts for which the PSO business unit has an association:
 - i. MCO 1 has an individual as a Member during a date range;
 - ii. MCO 2 has the same individual as a Member during a different date range (the individual changed MCOs).
- b. Two Members:
 - i. Member 1 is the individual enrolled with the two different MCOs at different periods of time.
 - ii. Member 2 is the individual receiving all services through Fee for Service – HHSC or LTC (not enrolled in managed care).

2. System User demonstrates, and RR Team validates that:

- a. MCO 1 System User logs into the EVV System.
 - i. MCO 1 System User can only view (not edit) the Member profile for dates of service when the individual was their Member.
 - ii. MCO 1 System User cannot view the Member profile for dates of service when the individual was not their Member.
 - iii. MCO 1 System User cannot view the individual not enrolled in Managed Care.
- b. MCO 2 System User logs into the EVV System.

- i. MCO 2 System User can only view (not edit) the Member profile for dates of service when the individual was their Member.
- ii. MCO 2 System User cannot view the Member profile for dates of service when the individual was not their Member.
- iii. MCO 2 System User cannot view the individual not enrolled in Managed Care.

15.2.3 MCO Read-Only Access – Service Attendant Profiles

Note: The MCO System User has read-only access in the EVV System to view only Service Attendant profiles for individuals who are associated with a Member of the System User's MCO.

Demonstration Steps

1. Data Setup in the EVV System:

- a. Two MCO user accounts for which the PSO business unit has an association:
 - i. MCO 1 has an individual as a Member during a date range;
 - ii. MCO 2 has the same individual as a Member during a different date range (the individual changed MCOs).
- b. Two Members:
 - i. Member 1 is the individual enrolled with the two different MCOs at different periods of time.
 - ii. Member 2 is the individual receiving all services through Fee for Service – HHSC or LTC (not enrolled in managed care).

2. System User demonstrates, and RR Team validates that:

- a. MCO 1 System User logs into the EVV System.
 - i. MCO 1 System User can only view (not edit) the Member profile for dates of service when the individual was their Member.
 - ii. MCO 1 System User cannot view the Member profile for dates of service when the individual was not their Member.
 - iii. MCO 1 System User cannot view the individual not enrolled in Managed Care.
- b. MCO 2 System User logs into the EVV System.
 - i. MCO 2 System User can only view (not edit) the Member profile for dates of service when the individual was their Member.
 - ii. MCO 2 System User cannot view the Member profile for dates of service when the individual was not their Member.
 - iii. MCO 2 System User cannot view the individual not enrolled in Managed Care.

15.2.4 MCO Read-Only Access – Schedules

Note: The MCO System User has read-only access in the EVV System to view schedules for the dates of service when the individual is a member of the MCO.

Demonstration Steps

1. Data Setup in the EVV System:

- a. Two MCO user accounts for which the PSO business unit has an association:
 - i. MCO 1 has an individual as a member during a date range;
 - ii. MCO 2 has the same individual as a member during a different date range (the individual changed MCOs).
- b. Two Members with scheduled visits:
 - i. Member 1 is the individual enrolled with the two different MCOs at different periods of time.
 - ii. Member 2 is the individual receiving all services through Fee for Service – HHSC or LTC (not enrolled in managed care).

2. System User demonstrates, and RR Team validates that:

- a. MCO 1 System User logs into the EVV System.
 - i. MCO 1 System User can only view (not edit) schedules for dates of service when the individual was their Member.
 - ii. MCO 1 System User cannot view schedules for dates of service when the individual was not their Member.
 - iii. MCO 1 System User cannot view the schedules for the Member who is not enrolled in Managed Care.
- b. MCO 2 System User logs into the EVV System.
 - i. MCO 2 System User can only view (not edit) schedules for dates of service when the individual was their Member.
 - ii. MCO 2 System User cannot view schedules for dates of service when the individual was not their Member.
 - iii. MCO 2 System User cannot view the schedules for the Member who is not enrolled in Managed Care.

15.2.5 MCO Read-Only Access – Authorizations

Note: The MCO System User has read-only access in the EVV System to view authorizations for the dates of service when the individual is a member of the MCO.

Demonstration Steps

1. Data Setup in the EVV System:

- a. Two MCO user accounts for which the PSO business unit has an association:
 - i. MCO 1 has an individual as a member during a date range;
 - ii. MCO 2 has the same individual as a member during a different date range (the individual changed MCOs).
- b. Two Members with authorizations:

- i. Member 1 is an individual enrolled with the two different MCOs at different periods of time.
 - ii. Member 2 is an individual receiving all services through Fee for Service – HHSC or LTC (not enrolled in managed care).
- 2. System User demonstrates, and RR Team validates that:**
- a. MCO 1 System User logs into the EVV System.
 - i. MCO 1 System User can only view (not edit) authorizations for dates of service when the individual was their Member.
 - ii. MCO 1 System User cannot view authorizations for dates of service when the individual was not their Member.
 - iii. MCO 1 System User cannot view the authorizations for the individual not enrolled in Managed Care.
 - b. MCO 2 System User logs into the EVV System.
 - i. MCO 2 System User can only view (not edit) authorizations for dates of service when the individual was their Member.
 - ii. MCO 2 System User cannot view authorizations for dates of service when the individual was not their Member.
 - iii. MCO 2 System User cannot view the authorizations for the individual not enrolled in Managed Care.

15.2.6 MCO Read-Only Access – Visit Transactions

Note: The MCO System User has read-only access in the EVV System to view visit transactions for the dates of service when the individual is a member of the MCO.

Demonstration Steps

- 1. Data Setup in the EVV System:**
- a. Two MCO user accounts for which the PSO business unit has an association:
 - i. MCO 1 has an individual as a member during a date range;
 - ii. MCO 2 has the same individual as a member during a different date range (the individual changed MCOs).
 - b. Two Members with visit transactions:
 - i. Member 1 is an individual enrolled with the two different MCOs at different periods of time.
 - ii. Member 2 is an individual receiving all services through Fee for Service – HHSC or LTC (not enrolled in managed care).
- 2. System User demonstrates, and RR Team validates that:**
- a. MCO 1 System User logs into the EVV System.
 - i. MCO 1 System User can only view (not edit) visit transactions for dates of service when the individual was their Member.
 - ii. MCO 1 System User cannot not view visit transactions for dates of service when the individual was not their Member.
 - iii. MCO 1 System User cannot view the visit transactions for the individual not enrolled in Managed Care.
 - b. MCO 2 System User logs into the EVV System.

- i. MCO 2 System User can only view (not edit) visit transactions for dates of service when the individual was their Member.
- ii. MCO 2 System User cannot view visit transactions for dates of service when the individual was not their Member.
- iii. MCO 2 System User cannot view the visit transactions for the individual not enrolled in Managed Care.

15.2.7 MCO Read-Only Access – Standard System Reports

Note: The MCO System User has read-only access in the EVV System to view standard system reports, however, the reports must only include data associated with the dates of service for which the individual is a member of the MCO.

All Proprietary Systems must generate the Service Delivery Exception Report. HHSC may waive standard reports according to the PSO Detailed Questionnaire responses listed below:

Question 2 has FMSA or Both checked, indicating the CDS business rules apply and the following reports:

- EVV System must request these CDS Employer reports from the EVV Aggregator web service:
 - EVV Attendant History Report
 - EVV Clock-In/Clock-Out Usage Report
 - EVV Reason Code Usage and Free Text Report
 - EVV Units of Service Summary Report
- EVV System must create this report CDS Employer report using data stored within the system:
 - EVV CDS Service Delivery Log

Question 20 is Yes, the PSO will be using a Landline Electronic Visit Verification Method.

- EVV System must create this report within the EVV Proprietary System:
 - EVV Landline Phone Verification Report

Question 8 is Yes, Service Attendants or CDS employees deliver non-EVV services.

- EVV System must create this report within the EVV Proprietary System:
 - Non-EVV Relevant Time Logged

Demonstration Steps

1. Data Setup in the EVV System:

- a. One HHSC user account for demonstration comparisons.
- b. Two MCO user accounts for which the PSO business unit has an association.
 - i. MCO 1 has an individual as a member during a date range;
 - ii. MCO 2 has the same individual as a member during a different date range (the individual changed MCOs).
- c. Multiple Managed Care Members enrolled with the two different MCOs at different periods of time with associated data relevant to the reports.

2. System User demonstrates, and RR Team validates that:

- a. HHSC System user logs into the EVV System.
 - i. HHSC System user generates the EVV Service Delivery Exception Report for a date range of 3 months.
 - ii. All data for all users for that date range are included in the counts.
 - iii. Report is kept available for comparison purposes in the next steps.
- b. MCO 1 System User logs into the EVV System.
 - i. MCO 1 System User generates the EVV Service Delivery Exception Report for the same date range as the HHSC System User. The total counts of visits should be different from what was viewed by the HHSC System User.
 - ii. MCO 1 System User views all other applicable standard system reports with data for whom the individual is their Member.
 - iii. MCO 1 System User cannot view applicable standard system reports with data for whom the individual is not their Member.
- c. MCO 2 System User logs into the EVV System.
 - i. MCO 2 System User generates the EVV Service Delivery Exception Report for the same date range as the HHSC System User. The total counts of visits should be different from what was viewed by the HHSC System User and the MCO 1 System User.
 - ii. MCO 2 System User views all other applicable standard system reports with data for whom the individual is their Member.
 - iii. MCO 2 System User cannot view applicable standard system reports with data for whom the individual is not their Member.

16. SDV-9P

Business Rule

SDV-9P: ‘EVV System’ must support overnight shifts.

16.1. Mobile Method – Overnight Visit with Schedules

Note: HHSC may waive this scenario if the PSO is not using Mobile Method (Question 23 is No).

Demonstration Steps

1. **Data Setup in the EVV System:**

- a. Member with a mobile method registered in the EVV System
- b. Service Attendant
- c. Scheduled overnight visit (starts 11:00 PM, ends 6:00 AM the next day)

2. **System User demonstrates, and RR Team verifies that:**

- a. A Service Attendant clocks in according to the schedule using the mobile method.
- b. A Service Attendant clocks out according to the schedule using the mobile method.
- c. The EVV system has accurately captured the following information (per SDV-1P):
 - i. Member receiving the service
 - ii. Service Attendant providing the service
 - iii. Proprietary System Operator Business Unit the Service Attendant is performing the service on behalf of
 - iv. Location where the service is delivered (home or community location, and correct ‘GPS’ coordinates)
 - v. Dates the service is performed overnight
 - vi. Time the service is performed (start and end)
 - vii. Type of service performed (HCPCS/Modifiers and Service Group/Service Code, if applicable)
- d. The EVV system has accurately captured the type of method used (Mobile Method).
- e. The text file to be submitted to the EVV Aggregator contains two visit records, one for the first date of service for 1 hour and a second visit record for the next date of service for 6 hours. The PSO must present this text file to the RR team in the format the EVV system will use to transmit it to the EVV Aggregator.

16.2. Mobile Method – Overnight Visit Without a Schedule

Note: HHSC may waive this scenario if the PSO is not using the Mobile Method (Question 23 is No).

Demonstration Steps

1. **Data Setup in the EVV System:**

- a. Member with a mobile method registered in the EVV System
- b. Service Attendant

2. **System User demonstrates, and RR Team verifies that:**

- a. A Service Attendant clocks in at 11:00 PM using the mobile method.
- b. A Service Attendant clocks out the next day at 6:00 AM using the mobile method.

- c. The EVV system has accurately captured the following information (per SDV-1P):
 - i. Member receiving the service
 - ii. Service Attendant providing the service
 - iii. Proprietary System Operator Business Unit the Service Attendant is performing the service on behalf of
 - iv. Location where the service is delivered (home or community location, and correct 'GPS' coordinates)
 - v. Dates the service is performed overnight
 - vi. Time the service is performed (start and end)
 - vii. Type of service performed (HCPCS/Modifiers and Service Group/Service Code, if applicable)
- d. The EVV system has accurately captured the type of method used (Mobile Method) .
- e. The text file to be submitted to the EVV Aggregator contains two visit records, one for the first date of service for 1 hour and a second visit record for the next date of service for 6 hours. The PSO must present this text file to the RR team in the format the EVV system will use to transmit it to the EVV Aggregator.

16.3. Alternative Device Method – Overnight Visit with Schedule

Note: HHSC may waive this scenario if the PSO is not using Alternative Device Method (Question 21 is No).

Demonstration Steps

1. Data Setup in the EVV System:

- a. Member with an alternative device method registered in the EVV System
- b. Service Attendant
- c. Scheduled overnight visit (starts 11:00 PM, ends 6:00 AM the next day)

2. System User demonstrates, and RR Team verifies that:

- a. A Service Attendant clocks in according to the schedule using the alternative device.
- b. A Service Attendant calls into the IVR with the clock-in information recorded from the alternative device.
- c. A Service Attendant clocks out according to the schedule using the alternative device method.
- d. A Service Attendant calls into the IVR with the clock-out information recorded from the alternative device.
- e. The EVV system has accurately captured the following information (per SDV-1P):
 - i. Member receiving the service
 - ii. Service Attendant providing the service
 - iii. Proprietary System Operator Business Unit the Service Attendant is performing the service on behalf of
 - iv. Location where the service is delivered (home)
 - v. Dates the service is performed overnight
 - vi. Time the service is performed (start and end)
 - vii. Type of service performed (HCPCS/Modifiers and Service Group/Service Code, if applicable)
- f. The EVV system has accurately captured the type of method used (Alternative Device).

- g. The text file to be submitted to the EVV Aggregator contains two visit records, one for the first date of service for 1 hour and a second visit record for the next date of service for 6 hours. The PSO must present this text file to the RR team in the format the EVV system will use to transmit it to the EVV Aggregator.

16.4. Alternative Device Method – Overnight Visit Without a Schedule

Note: HHSC may waive this scenario if the PSO is not using Alternative Device Method (Question 21 is No).

Demonstration Steps

1. Data Setup in the EVV System:

- a. Member with an alternative device method registered in the EVV System
- b. Service Attendant

2. System User demonstrates, and RR Team verifies that:

- a. A Service Attendant clocks in at 11:00 PM using the alternative device method.
- b. A Service Attendant calls into the IVR with the clock-in information recorded from the alternative device.
- c. A Service Attendant clocks out the next day at 6:00 AM using the alternative device method.
- d. A Service Attendant calls into the IVR with the clock-in information recorded from the alternative device.
- e. The EVV system has accurately captured the following information (per SDV-1P):
 - i. Member receiving the service
 - ii. Service Attendant providing the service
 - iii. Proprietary System Operator Business Unit the Service Attendant is performing the service on behalf of
 - iv. Location where the service is delivered (home)
 - v. Dates the service is performed overnight
 - vi. Time the service is performed (start and end)
 - vii. Type of service performed (HCPCS/Modifiers and Service Group/Service Code, if applicable)
- f. The EVV system has accurately captured the type of method used (Alternative Device).
- g. The text file to be submitted to the EVV Aggregator contains two visit records, one for the first date of service for 1 hour and a second visit record for the next date of service for 6 hours. The PSO must present this text file to the RR team in the format the EVV system will use to transmit it to the EVV Aggregator.

16.5. Landline Method – Overnight Visit with Schedule

Note: HHSC may waive this scenario if the PSO is not using Landline (Question 20 is No).

Demonstration Steps

1. Data Setup in the EVV System:

- a. Member with a landline method registered in the EVV System

- b. Service Attendant
- c. Scheduled overnight visit (starts 11:00 PM, ends 6:00 AM the next day)
- 2. **System User demonstrates, and RR Team verifies that:**
 - a. A Service Attendant calls into the IVR with the clock-in information according to the schedule.
 - b. A Service Attendant calls into the IVR with the clock-out information according to the schedule.
 - c. The EVV system has accurately captured the following information (per SDV-1P):
 - i. Member receiving the service
 - ii. Service Attendant providing the service
 - iii. PSO Business Unit the Service Attendant is performing the service on behalf of
 - iv. Location where the service is delivered (home)
 - v. Dates the service is performed overnight
 - vi. Time the service is performed (start and end)
 - vii. Type of service performed (HCPCS/Modifiers and Service Group/Service Code, if applicable)
 - d. The EVV system has accurately captured the type of method used (Landline).
 - e. The text file to be submitted to the EVV Aggregator contains two visit records, one for the first date of service for 1 hour and a second visit record for the next date of service for 6 hours. The PSO must present this text file to the RR team in the format the EVV system will use to transmit it to the EVV Aggregator.

16.6. Landline Method – Overnight Visit Without a Schedule

Note: HHSC may waive this scenario if the PSO is not using Mobile Method (Question 23 is No).

Demonstration Steps

- 1. **Data Setup in the EVV System:**
 - a. Member with a landline registered in the EVV System
 - b. Service Attendant
- 2. **System User demonstrates, and RR Team verifies that:**
 - a. A Service Attendant calls into the IVR recording 11:00 PM for day one as the clock-in information.
 - b. A Service Attendant calls into the IVR recording 6:00 AM the next day as the clock-out information.
 - c. The EVV system has accurately captured the following information (per SDV-1P):
 - i. Member receiving the service
 - ii. Service Attendant providing the service
 - iii. Proprietary System Operator Business Unit the Service Attendant is performing the service on behalf of
 - iv. Location where the service is delivered (home)
 - v. Dates the service is performed overnight
 - vi. Time the service is performed (start and end)
 - vii. Type of service performed (HCPCS/Modifiers and Service Group/Service Code, if applicable)
 - d. The EVV system has accurately captured the type of method used (Landline).

- e. The text file the EVV system will submit to the EVV Aggregator contains two visit records, one for the first date of service for 1 hour and a second visit record for the next date of service for 6 hours. The PSO must present this text file to the RR team in the format the EVV system will use to transmit it to the EVV Aggregator.

17. SDV-51P

Business Rule

SDV-51P: ‘EVV System’ must adhere to the HHSC EVV Policy Handbook in regard to ‘Optional Alert for Reaching Weekly Authorized Hours’ if the ‘Proprietary System Operator’ chooses to implement this optional ‘Visit Maintenance’ reduction solution.

EVV Policy Reference

Optional Alert for Reaching Weekly Authorized Hours: This optional alert will notify the provider agency when the person’s authorized hours are close to being reached for the week. This feature will only work if the authorization hours are entered correctly into the EVV system.

17.1. Authorization Utilization Alert

Note: HHSC may waive this scenario if the PSO has indicated they do not wish to use this Optional alert (Question 13 is No).

Demonstration Steps

1. Data Setup in the EVV System:

- a. Member
- b. Service Attendant
- c. Authorization for delivery of service
- d. Scheduled visit for 8 AM to Noon (4 hours in duration).
- e. Service Attendant clocks in and out for a total duration of 4 hours.

2. System User demonstrates, and RR Team verifies that:

- a. The visit transaction is verified in the EVV System and alerts the System User that the weekly authorization units are reaching maximum usage.
- b. The System User confirms the alert and accepts the visit.

18. PAO-8P & PAO-9P

Business Rules

PAO-8P: ‘EVV System’ must create a unique profile for each ‘Service Attendant’ containing the ‘Service Attendant’ identification Information listed in PAO-9P (at a minimum). This includes ‘CDS Employees’.

PAO-9P: ‘EVV System’ must electronically document the following data elements for the ‘Service Attendant’ identification information:

- ‘Texas EVV Service Attendant Identification Number’
- Legal Name (Last, First, MI)
- Permanent address (Street, City, State, ZIP+4)

18.1. Service Attendant Profile

Demonstration Steps

1. Data Setup in the EVV System:

- a. Service Attendant Profile for 5 individuals.
- b. Visits delivered by each of the Service Attendants.
- c. At least one Service Attendant must be a CDS employee.
 - i. This setup in the scenario may be waived if the PSO is not an FMSA (Detailed Questionnaire # 2 is No).

2. System User demonstrates, and RR Team verifies that:

- a. Each Service Attendant profile must include the following data to meet the business rule:
 - i. Texas EVV Service Attendant Identification Number: Last 4 digits of the SSN or passport number plus last name
 - ii. Legal Name (last name, first name, middle initial)
 - iii. Permanent address (Street, City, State, ZIP+4)
- b. If the PSO is an FMSA then a Service Attendant can be demonstrated as a CDS employee by showing one or more visit transactions demonstrating that the Service Attendant performed EVV services for a Member who is a CDS employer.

19. PAO-14P & PAO-15P

Business Rules

PAO-14P: ‘EVV System’ must create a unique profile for each ‘Member’ receiving services containing the identification Information listed in PAO-15P (at a minimum).

PAO-15P: ‘EVV System’ must electronically document the following data elements for the ‘Member’s identification information:

- Texas Medicaid Identification Number
- Legal Name (Last, First, MI)
- Date of Birth
- Medicaid Eligibility start date
- Medicaid Eligibility end date
- Managed Care Eligibility start date
- Managed Care Eligibility end date
- Address (Street, City, State, ZIP+4)
- Landline Home phone number

19.1. Member Profile

Demonstration Steps

1. **Data Setup in the EVV System:**
 - a. Member Profiles for 3 individuals.
2. **System User demonstrates, and RR Team verifies that:**
 - a. Each Member screen print must include the following data to meet the business rule:
 - i. Texas Medicaid Identification Number (nine-digit identifier)
 - ii. Legal Name (last name, first name, middle initial)
 - iii. Date of Birth
 - iv. Medicaid Eligibility start date
 - v. Medicaid Eligibility end date
 - vi. Managed Care Eligibility start date
 - vii. Managed Care Eligibility end date
 - viii. Address (Street, City, State, ZIP+4)
 - ix. Landline Home phone number