Path 1. Proprietary System Operator (PSO) Onboarding Process Overview for a Proprietary System Not Yet Approved by HHSC

PSOs will follow this process when choosing a system that is not on the list of EVV Proprietary Systems Approved by HHSC located on the TMHP EVV Proprietary Systems website

Task	Responsible Party	Due Date	Resources
1. PSO must access and review all PSO technical requirements, HHSC EVV Policy and EVV PSO Business Rules.	PSO	Based on development activity of the system.	• TMHP EVV Proprietary System Web Page • HHSC EVV Proprietary Systems Web Page
2. PSO must complete and submit EVV Proprietary System Request Packet to TMHP by email: a) EVV Proprietary Request Form b) Proprietary System (PS) Detailed Questionnaire c) TMHP Interface Access Request	PSO	Anytime throughout the year.	• Email to: EVV_PSO@tmhp.com • EVV Proprietary System Request Form • PS Detailed Questionnaire • TMHP Interface Access Request (Please email TMHP, prior to submitting your packet to receive this document)
3. TMHP assigns a Path 1 Operational Readiness Review (ORR) session and informs the PSO by email.	TMHP	10 business days after receipt of the EVV Proprietary System Request Packet.	• EVV Proprietary Request Form • Proprietary System (PS) Detailed Questionnaire • TMHP Interface Access Request
4. PSO must confirm the Path 1 ORR session by email to HHSC and TMHP.	PSO	5 business days after HHSC assignment email is sent to PSO.	• Email to: EVVPSO@hhs.texas.gov • Email to: EVV_PSO@tmhp.com
5. PSO must complete the TMHP EVV System Access and Connectivity Testing.	PSO, TMHP	10 business days prior to the assigned ORR session.	• TMHP technical support as needed • TMHP to set up testing environment for PSO • PSO to perform TMHP EVV Aggregator interface testing
6. PSO must attend an ORR Planning Meeting with HHSC and TMHP.	PSO, TMHP, HHSC	5 business days prior to the assigned ORR session.	• Review the PS System Request Packet • Confirm PSO awareness of all technical requirements • Review next steps with PSO • HHSC Certification form
7. PSO begins ORR with HHSC and TMHP as assigned.	PSO, TMHP, HHSC	Up to 10 business days after successful EVV System	• EVV Proprietary System Operator Onboarding Process • Round 1 is 10 days (3 demos + 5 days of correction by PSO)

Task	Responsible Party	Due Date	Resources
		Access and Connectivity Testing.	• Round 2 is 8 days (2 demos + 5 days of correction by PSO) • Round 3 is 2 days (2 demos). • Total of up to 30 business days
8. Trading Partner Testing (TPT) files are due to TMHP.	PSO	1st day of ORR	• PSO to turn in TPT files to TMHP for review.
9. HHSC informs PSO of the rejection or approval to go-live.	HHSC	5 business days after completion of all components of the ORR.	For rejection: • Transmit rejection letter on HHSC letterhead to PSO executive leadership • Ask PSO if they wish to be placed on a waiting list for a future session For approval: • Transmit acceptance letter on HHSC letterhead to PSO executive leadership • Confirm Go-Live (GL) date • Send letter to the impacted MCOs PSO must go-live with new EVV system within 45-90 calendar days of HHSC approval to go-live (see Onboarding Process document).
10. PSO must perform Data Transfer from current EVV System to new EVV System (when applicable).	PSO	10 business days before their GL Date.	• TMHP provides support as necessary (if transferring from an EVV vendor system in the state vendor pool) • TMHP and PSO will work with PSO's current EVV vendor (when applicable) for a Data Transfer plan • TMHP will provide approval to EVV Vendors to provide data transfer files to the PSO (when applicable).
11. TMHP issues production credentials.	TMHP	10 business days before their GL date.	• TMHP sets up security access, and PSO system information in the EVV Aggregator in production • TMHP securely shares production security credentials with PSO
12. TMHP and HHSC verify production system operation.	TMHP, HHSC	GL plus up to 30 business days.	• TMHP and HHSC monitor through internal metrics

Task	Responsible Party	Due Date	Resources
			• HHSC updates the list of EVV Proprietary Systems Approved by HHSC (if applicable) • HHSC updates the EVV Proprietary System Access and Training Guide

Path 2. PSO Onboarding Process Overview When Using an Approved Proprietary System

PSOs will follow this process when choosing an Approved Proprietary System from the list of EVV Proprietary Systems Approved by HHSC. If there are system features requested by the PSO other than those listed on the list of EVV Proprietary Systems Approved by HHSC, then the PSO must use the Path 1 process as documented in the Path 1 table above and the PSO Onboarding Process document. HHSC and TMHP will provide guidance regarding required steps within the Path 1 process based on analysis of the EVV Proprietary System Detailed Questionnaire submitted by the PSO.

Task	Responsible Party	Due Date	Resources
1. PSO must access and review all PSO technical requirements, HHSC EVV Policy and EVV PSO Business Rules.	PSO	Based on schedule for the PSO to go-live.	• TMHP EVV Proprietary System Web Page • HHSC EVV Proprietary Systems Web Page
2. PSO must complete and submit EVV Proprietary System Request Packet to TMHP by email: a) EVV Proprietary Request Form b) Proprietary System (PS) Detailed Questionnaire c) TMHP Interface Access Request	PSO	Anytime throughout the year.	• Email to: EVV_PSO@tmhp.com • EVV Proprietary System Request Form • PS Detailed Questionnaire • TMHP Interface Access Request (Please email TMHP, prior to submitting your packet to receive this document)
3. TMHP assigns a Path 2 PSO ORR session and informs the PSO by email.	TMHP	10 business days after receipt of the EVV Proprietary System Request Packet.	• EVV Proprietary Request Form • Proprietary System (PS) Detailed Questionnaire • TMHP Interface Access Request
4. PSO must confirm the assigned Path 2 ORR Session.	PSO, TMHP	5 business days after HHSC ORR session assignment email is sent to PSO.	• Email to: EVVPSO@hhs.texas.gov • Email to: EVV_PSO@tmhp.com

	Task	Responsible Party	Due Date	Resources
5.	PSO must attend an ORR Planning Meeting with HHSC and TMHP.	PSO, TMHP, HHSC	5 business days prior to the assigned ORR session.	• Review the PS System Request Packet • Confirm PSO awareness of all requirements • Confirm selected EVV system and features to be used • Review next steps with PSO • Confirm a planned Go-live (GL) date for the PSO. PSO GL must be within 45-90 calendar days of HHSC approval to go-live (see Onboarding Process document). • HHSC Certification form
6.	PSO must submit the signed HHSC Certification form by email to HHSC.	PSO	Day 1 of the ORR Path 2 session.	• HHSC Certification Form • Email to: EVVPSO@hhs.texas.gov • Email to: EVV_PSO@tmhp.com
7.	PSO must participate in the assigned ORR Path 2 session. **Required Trading Partner Testing (TPT):** PSO must submit EVV Visit transactions to the Aggregator prior to go-live. **Optional Demonstrations:** HHSC will determine if the PSO must demonstrate features of the chosen system that have not yet been approved by HHSC.	PSO	During the ORR Path 2 session.	• The Path 2 ORR schedule will be customized per PSO. • TMHP confirms successful processing of visit transaction data (acceptance and rejection).

8.	HHSC informs PSO of the rejection or approval to go-live.	HHSC	5 business days after completion of all components of the ORR.	• For rejection:
				  • Transmit rejection letter on HHSC letterhead to PSO executive leadership
				  • Ask PSO if they wish to be placed on a waiting list for a future session
				• For approval:
				  • Transmit acceptance letter on HHSC letterhead to PSO executive leadership
				  • Confirm Go-Live (GL) date
				  • Send letter to the impacted MCOs PSO GL must be within 45-90 calendar days of HHSC approval to go-live (see Onboarding Process document).

Task	Responsible Party	Due Date	Resources

9. PSO must perform Data Transfer from current EVV System to new EVV System (when applicable).	PSO	10 business days before their GL Date.	• TMHP provide support as necessary (if transferring from State Approved Vendor)
			  • TMHP and PSO will work with PSO's current EVV system (when applicable) for a Data Transfer plan
			  • TMHP will provide approval to EVV Vendors to provide data transfer files to the PSO (when applicable).

10. TMHP issues production credentials.	TMHP	10 business days before their GL date.	• TMHP sets up security access, and PSO system information in the EVV Aggregator in production • TMHP securely shares production security credentials with PSO
11. TMHP and HHSC verify production system operation.	TMHP, HHSC	GL plus up to 30 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