Electronic Visit Verification (EVV) Required Training Checklists

Purpose: The purpose of this document is to help program providers, financial management services agencies (FMSAs), Consumer Directed Services (CDS) employers, service providers, and CDS employees understand EVV training requirements, complete required EVV training, and track training completion. Complete required EVV training:

- Prior to using either an EVV vendor system or an EVV proprietary system.

- Yearly thereafter.

Refer to sections 4200 EVV Training - 4250 EVV Training Registration of the EVV Policy Handbook to review EVV training requirements and training policies.

Instructions:

1. Click a checklist to navigate directly to it:

2. To track training completion in this document, download and save it. Open it in Adobe Acrobat Reader (version 8 and later). You may download the free version on the Adobe website if needed.

3. When you're done with the training, click the **Completed** checkbox in the checklist to indicate completion. Save the PDF to your local drive for your training records.

Training Audience Definitions:

- **EVV system users** are staff who have access to the EVV system, perform EVV system operations and visit maintenance in the EVV system.

- **EVV Portal users** are staff who have access to the EVV Portal, conduct visit or claim searches, and generate reports.

- **Billing staff** are staff who submit Medicaid claims for an EVV-required service.

EVV Training Checklist for Program Providers

EVV Policy Training: For EVV System Users, EVV Portal Users, and Billing Staff

The payers provide training on EVV standards and policy requirements in the EVV Policy Handbook. Complete **one** of the following training options:

- Attend an HHSC EVV Policy training webinar or complete a course on the HHS Learning Portal to receive your certificate of completion:

  ▸ *EVV Policy Training for Program Providers and FMSAs* course

  ▸ *EVV Policy Training – Webinar Recordings* course

- Complete training provided by your managed care organization (MCO). Contact your MCO for training opportunities.

Completed: ☐

EVV System Training: For EVV System Users

The EVV vendor (HHAeXchange) or EVV Proprietary System Operator (PSO) provides training on their EVV system and the clock in and clock out methods used to electronically document service delivery. After completing this training, you must train your service providers on the clock in and clock out method(s).

- If using the **EVV vendor system (HHAeXchange Portal)**: Complete training on the HHAeXchange Learning Management System (LMS) and pass the test at the end of your learning plan to receive your certificate of completion. Instructions are in the HHAeXchange LMS Job Aid. Additionally, clock in and clock out methods training materials are available on the HHAeXchange TX Service Providers and Consumer Directed Services webpage in English and Spanish. Contact HHAX if you have questions.

- If using an **EVV proprietary system**: Contact your PSO for training opportunities.

Completed: ☐

EVV Portal Training: For EVV Portal Users and Billing Staff

Texas Medicaid & Healthcare Partnership (TMHP) provides training on the EVV Portal, an online system that allows users to perform searches and view reports associated with visit data and EVV claim match results.

- Complete the *TMHP Electronic Visit Verification (EVV) CBT* on the TMHP Learning Management System (LMS) to receive your certificate of completion.

Completed: ☐

Reminder: Program providers must keep up-to-date training records for their staff.

EVV Training Checklist for FMSAs

EVV Policy Training: For EVV System Users, EVV Portal Users, and Billing Staff

The payers provide training on EVV standards and policy requirements in the [EVV Policy Handbook](#). Complete **one** of the following training options:

- Attend an HHSC EVV Policy training webinar or complete a course on the [HHS Learning Portal](#) to receive your certificate of completion:
  - *EVV Policy Training for Program Providers and FMSAs* course
  - *EVV Policy Training – Webinar Recordings* course
- Complete training provided by your managed care organization (MCO). [Contact your MCO](#) for training opportunities.

Completed: ☐

EVV System Training: For EVV System Users

The EVV vendor or EVV Proprietary System Operator (PSO) provides training on their EVV system and the clock in and clock out methods used to electronically document service delivery.

- If using the **EVV vendor system (HHAeXchange Portal)**: Complete training on the [HHAeXchange Learning Management System (LMS)](#) and pass the test at the end of your learning plan to receive your certificate of completion. Instructions are in the [HHAeXchange LMS Job Aid](#). Additionally, clock in and clock out methods training materials are available on the [HHAeXchange TX Service Providers and Consumer Directed Services webpage](#) in English and Spanish. Contact [HHAX](#) if you have questions.
- If using an **EVV proprietary system**: Contact your PSO for training opportunities.

Completed: ☐

EVV Portal Training: For EVV Portal Users and Billing Staff

[Texas Medicaid & Healthcare Partnership (TMHP)](#) provides training on the EVV Portal, an online system that allows users to perform searches and view reports associated with visit data and EVV claim match results.

- Complete the *TMHP Electronic Visit Verification (EVV) CBT* on the [TMHP Learning Management System (LMS)](#) to receive your certificate of completion.

Completed: ☐

Reminder: FMSAs must keep up-to-date training records for their staff. FMSAs may request training records from their CDS employers.

EVV Training Checklist for CDS Employers

EVV Policy Training

The payers provide training on EVV standards and policy requirements in the [EVV Policy Handbook](). Complete one of the following training options to receive your certificate:
 	
• Attend an HHSC EVV Policy training webinar or complete a course on the [HHS Learning Portal]():
 	
    ▸ *EVV Policy Training – Webinar Recordings* course (video format)
 	
    ▸ *EVV Policy Training for CDS Employers* computer-based training course (also available in Spanish)
 	
• Complete training provided by your managed care organization (MCO). [Contact your MCO]() for training opportunities.

Completed: ☐

EVV System Training
The EVV vendor (HHAeXchange) or EVV Proprietary System Operator (your FMSA) provides training on their EVV system and the clock in and clock out methods used to electronically document service delivery. Contact your FMSA if you're not sure which EVV system the FMSA selected. • If using the **EVV vendor system (HHAeXchange Services Portal)**: Access the [HHAeXchange TX Service Providers and Consumer Directed Services webpage]() and follow the instructions on the **Consumer Directed Training** tab. Clock in and clock out methods training is available in English and Spanish. Contact [HHAX]() with questions. • If using an **EVV proprietary system**: Contact your FMSA for training opportunities. After completing this training, you must train your CDS employees on the clock in and clock out method(s). The EVV vendor or PSO (your FMSA) will provide materials and resources. Use [Form 1732, Management and Training of Service Provider](), to keep up-to-date training records of CDS employee training completions. Provide Form 1732 to your FMSA.

Completed: ☐

Reminders: If you have a designated representative (DR), the DR must complete the required EVV training. You must keep up-to-date training records of your training completions and provide training records to your FMSA, HHSC, or your MCO, if requested.

EVV Training Checklist for Service Providers and CDS Employees

Clock In and Clock Out Methods Training
Service providers and CDS employees must complete training on the clock in and clock out method(s) used to electronically document service delivery. Approved methods include the: ● Mobile method (a mobile application) ● Home phone landline ● Alternative device **Training Providers:** ● Program providers are responsible for training their service providers on the clock in and clock out method(s). ● CDS employers are responsible for training their CDS employees on the clock in and clock out method(s). The EVV vendor or EVV Proprietary System Operator (PSO) provides training materials and resources. ● **Note:** The EVV vendor (HHAeXchange) has clock in and clock out methods training available on the HHAeXchange TX Service Providers and Consumer Directed Services webpage in English and Spanish.

Completed: ☐