



# Electronic Visit Verification Required Training Checklists

Electronic Visit Verification (EVV) Required Training Checklists are included to help program providers, financial management services agencies (FMSAs), Consumer Directed Services (CDS) employers, and service providers/CDS employees complete and track EVV training completion. HHSC and managed care organizations (MCOs) may take enforcement action if you do not complete required training.

Required EVV training must be completed:

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

**Note:** If you're transferring to another EVV system, you must complete training on that system before using it.

Refer to sections [4200 EVV Training](#) - [4250 EVV Training Registration](#) to view HHSC EVV training requirements and training policies.

[Sign up for EVV email updates](#) to receive EVV webinar registration notices, training updates, and important EVV announcements.

## Checklists

Navigate to the checklist applicable to you in this document:

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- EVV Training Checklist for Service Providers and CDS Employees – Page 5

Interactive (fillable form) features in each checklist allow you to click the checkbox to indicate training was completed. To interact with the PDF:

- Download and save the EVV Required Training Checklists (PDF) first.
- Open the EVV Required Training Checklists (PDF) in Adobe Acrobat Reader (version 8 and later). If you don't have it, you may download the latest version of it for free from: <https://get.adobe.com/reader/otherversions>
- Click a checkbox to indicate completion. When done, save the completed PDF to your local drive for your training records.

# EVV Training Checklist for Program Providers

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

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 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 to receive your certificate of completion:

- HHSC: Attend an EVV Policy training live webinar or complete the appropriate training course on the [HHS Learning Portal](#):
  - ▶ *EVV Policy Training for Program Providers and FMSAs* course
  - ▶ *EVV Policy Training – Webinar Recordings* course
- MCOs: [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, which electronically documents and verifies data related to service delivery. This training includes how to use the clock in and clock out methods. After completing this training, you must train your service providers on the clock in and clock out method(s).

Contact your EVV [vendor](#) (if using an EVV vendor system) or PSO (if using an EVV proprietary system) 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 EVV CBT* on the [TMHP Learning Management System \(LMS\)](#) to receive your certificate of completion.

Completed: ☐

# EVV Training Checklist for FMSAs

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

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 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 to receive your certificate of completion:

- HHSC: Attend an EVV Policy training webinar or complete the appropriate training course on the [HHS Learning Portal](#):
  - ▶ *EVV Policy Training for Program Providers and FMSAs* course
  - ▶ *EVV Policy Training – Webinar Recordings* course
- MCOs: [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, which electronically documents and verifies data related to service delivery. This training includes how to use the clock in and clock out methods. After completing this training, you must train your service providers on the clock in and clock out method(s).

Contact your EVV [vendor](#) (if using an EVV vendor system) or PSO (if using an EVV proprietary system) 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 EVV CBT* on the [TMHP Learning Management System \(LMS\)](#) to receive your certificate of completion.

Completed: ☐

# EVV Training Checklist for CDS Employers

CDS employers must complete applicable required EVV training. If the CDS employer has a designated representative (DR), the DR completes the required EVV training based on the option selected by the CDS employer. CDS employers must keep up-to-date training records of their training completions and provide training records to their FMSA, HHSC, or their MCO, if requested.

## 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 of completion:

- HHSC: Attend an EVV Policy training for CDS employers webinar or complete the appropriate training course on the [HHS Learning Portal](#):
  - ▶ *Initial EVV Policy Training for CDS Employers* course
  - ▶ *EVV Policy Training – Webinar Recordings* course
- MCOs: [Contact your MCO](#) for training opportunities.

Completed: ☐

## EVV System Training

The EVV vendor or EVV Proprietary System Operator (your FMSA) provides training on their EVV system, which electronically documents and verifies data related to service delivery. This training includes how to use the clock in and clock out methods.

Full EVV system training is required for CDS employers that selected Option 1 or 2 on Form 1722, Employer's Selection for EVV Responsibilities; an overview EVV system training is required for CDS employers that selected Option 3 on Form 1722.

Contact your EVV [vendor](#) (if using an EVV vendor system) or FMSA (if using an EVV proprietary system) 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 EVV Proprietary System Operator (your FMSA) will assist you. CDS employers must use [Form 1732](#), Management and Training of Service Provider, to keep up-to-date training records of CDS employee training completions. Form 1732 should be provided to the FMSA.

Completed: ☐

# EVV Training Checklist for Service Providers and CDS Employees

## Clock In and Clock Out Methods Training

Service providers and CDS employees must use an HHSC-approved clock in and clock out method to begin and end service delivery when providing EVV services to a member in the home or community. Approved methods include the:

- Mobile method
- Home phone landline
- Alternative device

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) will provide materials and resources.

Completed: ☐