



Guide for Financial Management Services Agencies, Consumer Directed Services Employers, Designated Representatives and CDS Employees to Get Started with Electronic Visit Verification

Purpose

The Texas Health and Human Services Commission (HHSC) published the following document to assist Financial Management Services Agencies (FMSAs), Consumer Directed Services (CDS) employers, Designated Representatives (DRs) and CDS employees in getting started with EVV.

Responsibilities of FMSAs

Select an EVV vendor system or request HHSC approval to become an EVV Proprietary System Operator (PSO).

- FMSAs selecting an **EVV vendor** from the state vendor pool must:
 - ▶ Receive EVV system training from the EVV vendor.
 - ▶ Provide login credentials to the CDS employers and CDS employees.
 - ▶ Ensure all necessary EVV users are trained on the EVV system selected.
 - ▶ Assist CDS employers with EVV training, as needed.
 - ▶ Ensure up-to-date training records are kept for their staff and their CDS employers.
 - ▶ Ensure CDS employers have the correct contact information for the EVV system the FMSA selected.
- FMSAs that selected and were approved to operate an EVV proprietary system is known as the **EVV Proprietary System Operator**. The PSO must:
 - ▶ Provide login credentials to the CDS employers and CDS employees.
 - ▶ Ensure all necessary EVV users are trained on the EVV proprietary system, including HHSC and managed care organization (MCO) staff.
 - ▶ Ensure up-to-date training records are kept for their staff and their CDS employers.

FMSAs must:

- Document on [Form 1722, Employer's Selection for Electronic Visit Verification Responsibilities](#) the name and contact information of the EVV system that the FMSA selected.
- Provide a copy of Form 1722 to the CDS employer or their DR.

- Enter identification data within the EVV system for all Medicaid recipients, CDS employers, CDS employees and DRs, if applicable.
- Enter Option 1, 2 or 3, the visit maintenance responsibilities of the CDS employer and FMSA, into the EVV system based on the CDS employer's selection on Form 1722.
- NOTE: If Form 1722 is not returned to the FMSA, EVV visit maintenance responsibilities will default to Option 3.
- Enter member information, including:
 - ▶ Medicaid ID
 - ▶ Date of Birth
 - ▶ Address
 - ▶ Phone Number (Include member's home phone landline, if applicable)
 - ▶ Member's authorization information (Keep current)
- Ensure that all members' profile information in the EVV System is correct and up to date.
- Ensure the CDS employer understands EVV policy training requirements for CDS employers and CDS employees. Review the HHSC EVV Training Policy for additional information.
- Provide the CDS employer with EVV policy training if the CDS employer requests assistance.
- Ensure the CDS employer and their CDS employee(s) choose one or more clock in and clock out methods for the CDS employee(s) to use.
- Enter the electronic verification method(s) the CDS employer selected, into the member profile.
- Enter mobile phone number or device number into the CDS employer/member profile if the CDS employee is using a mobile method.
- If applicable:
 - ▶ Request an alternative device on behalf of the CDS employer upon request.
 - ▶ Enter primary and alternate home phone landline numbers.

Additional Resources

- [HHSC EVV website](#)
- [EVV Training Policy](#)
- [EVV Contact Information Guide for Program Providers and FMSAs](#)
- [Cures Act EVV: Training Requirements Checklists \(PDF\)](#)
- [Existing Provider EVV Training Requirements Checklist \(PDF\)](#)

Responsibilities of CDS Employers and Designated Representatives

Complete all EVV required training based on the visit maintenance responsibilities option selected on [Form 1722 Employer's Selection for Electronic Visit Verification Responsibilities](#). Review the EVV Training Policy for additional information.

- If Option 1 or 2 is selected, complete:
 - ▶ EVV Policy Training
 - ▶ Complete EVV System Training
- If Option 3 is selected, complete:
 - ▶ EVV Policy Training
 - ▶ Overview of EVV System Training

Train the CDS employee(s) on how to clock in and clock out using EVV.

- NOTE: The EVV vendor or EVV PSO provides training resources for clock in and clock out training to the CDS employer.

Keep up-to-date training completion records and provide to the FMSA, HHSC or their MCO, if requested.

If CDS employee(s) will use an alternative device for clocking in and clocking out, order an alternative device or request the FMSA to order the device on behalf of CDS employer.

Provide a primary home phone landline number to the EVV vendor or PSO, if CDS employee(s) will use CDS employer's home phone landline for clocking in and clocking out.

If the mobile method is selected for clocking in and clocking out, ensure each CDS employee has their own login credentials

Ensure the smart phone or device (tablet) is registered within the EVV system and associated with the member's profile.

CDS employers may:

- Allow their CDS employee(s) to use their personal smartphone or device (tablet) with the mobile method for clocking in and clocking out.

CDS employers or their DR must:

- Submit Form 1722 to their FMSA.
 - ▶ NOTE: The completed Form 1722 should be sent to the FMSA. Do not send a copy of Form 1722 to the EVV vendor.

CDS employers and their CDS employee(s) must:

- Select one or more clock in and clock out method(s) the CDS employee(s) will use:
 - ▶ EVV Mobile Method
 - ▶ EVV Home Phone Landline
 - ▶ Alternative Device

Responsibilities of CDS Employees

CDS employees must:

- Use the EVV system to clock in when EVV services begin and clock out when EVV services end.
- Inform their CDS employer immediately if an alternative device malfunctions or fails to generate codes, if an alternative device is used for clocking in and clocking out.
 - ▶ NOTE: The alternative device must always remain in the member's home, even during emergencies and disasters. If the alternative device does not remain in the home, visits may be subject to recoupment and the payer may make a Medicaid fraud referral to the HHS Office of the Inspector General.
- Record the visit when they begin or end an EVV service outside the member's home either by:
 - ▶ Using the mobile method, or
 - ▶ Manually documenting the visit as described in the EVV visit maintenance policy.
- If the mobile method is used, follow the instructions from the CDS employer to download and activate the mobile application and obtain their own unique login credentials from the EVV vendor or EVV PSO.
- If the mobile method is being used, the CDS employee must only access the EVV mobile application method using their own login credentials and **must not share login credentials** to access the EVV mobile application method.
- They may use their own personal smart phone or tablet, or a smart phone or tablet owned by the CDS employer, **only if** the CDS employer has authorized the CDS employee to use the CDS employer's smart phone or tablet.

Additional Resources

- [HHSC EVV website](#)
- [EVV Training Policy](#)
- [EVV Contact Information Guide for CDS Employers](#)
- [HHS Learning Portal \(EVV Policy Training for CDS Employers\)](#)