



Electronic Visit Verification (EVV)

Visit Maintenance Unlock Request Job Aid for Program Providers and Financial Management Services Agencies

February 2024

This document provides step-by-step instructions for program providers and financial management services agencies (FMSAs) to follow when completing a Visit Maintenance Unlock Request and includes common Visit Maintenance Unlock Request examples. Refer to [8060 Visit Maintenance Unlock Request](#) in the EVV Policy Handbook for policy regarding this process.

- **What is a Visit Maintenance Unlock Request?**

A Visit Maintenance Unlock Request is an Excel spreadsheet template provided by payers on the payers' websites. It must be completed and submitted to your payer in a secure email. When approved, it allows you the opportunity to correct certain data elements on an EVV visit transaction after the visit maintenance time frame has expired. It also allows you to export visits that were previously corrected but haven't been sent to the EVV Aggregator for the EVV claims matching process.

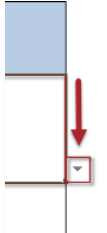
- **Why is a Visit Maintenance Unlock Request Needed?**

After the visit maintenance time frame has expired, the EVV system locks the EVV visit transaction and it cannot be edited. Program providers and FMSAs must ensure all required data elements are correct and visit maintenance is complete before submitting an EVV claim to the appropriate claims management system.

Visit Maintenance Unlock Request Process for Program Providers and FMSAs

1. Access the Visit Maintenance Unlock Request on your payer's webpage.
 - If **HHSC** is your payer: Access the [EVV Visit Maintenance Unlock Request for Program Providers and FMSAs \(Excel\)](#).
 - If a **managed care organization (MCO)** is your payer: Access the EVV Visit Maintenance Unlock Request for Program Providers and FMSAs (Excel) from your MCO's website. MCO websites are on the last page of the [EVV Contact Information Guide for Program Providers and FMSAs \(PDF\)](#).
2. Open the EVV Visit Maintenance Unlock Request for Program Providers and FMSAs (Excel).
 - **Tip:** You may need to zoom in to see the items in the drop-down lists. To enlarge the VMUR, click **View > Zoom** on the toolbar and select a magnification level; then click **OK**. Or click the **+** or **-** icons on the lower right of the screen to zoom in or zoom out.
3. The Visit Maintenance Unlock Request (Excel) includes two tabs:
 - **Instructions** tab - Please read the instructions before completing the PP-FMSA VMUR tab.
 - **PP-FMSA VMUR** tab – Use this tab to complete the Visit Maintenance Unlock Request.
4. On the PP-FMSA VMUR tab, enter the information needed for the Visit Maintenance Unlock Request. Do not modify the spreadsheet tab names or contents within the spreadsheet.
 - **Navigation tips:** Some fields display a drop-down arrow on the right side of the field when clicked; click the drop-down arrow and select your choice from the list. Otherwise, type in the data needed. You can use your mouse to click from one field to the next; or use the **Tab** key on the keyboard. Example:

Program Provider and FMSA Must Complete the Following:	
Payer (listed on the visit)	<input type="text"/>
EVV Vendor System	<input type="text"/>
Proprietary System Name	<input type="text"/>



Payer and EVV System Information

Click the **Payer (listed on the visit)** field to display the drop-down arrow. Click the drop-down arrow and select your payer from the list. Refer to [2100 Payers](#) in the EVV Policy Handbook to view a list of services under each payer.

If you are using an EVV vendor system, click the **EVV Vendor System** field to display the drop-down arrow and select your EVV vendor from the list. Leave the Proprietary System Name field blank. Example:

Program Provider and FMSA Must Complete the Following:	
Payer (Listed on the visit)	HHSC (Acute Care)
EVV Vendor System	HHAeXchange
Proprietary System Name	

If you are using an EVV proprietary system, click the **EVV Vendor System** field to display the drop-down arrow and select **Proprietary System** from the list. Enter the name of the proprietary system you are using in the **Proprietary System Name** field. Example:

Program Provider and FMSA Must Complete the Following:	
Payer (Listed on the visit)	Blue Cross Blue Shield
EVV Vendor System	Proprietary System
Proprietary System Name	EVV Proprietary System Name

Program Provider and FMSA Information

Program Provider and FMSA Information					
Program	Program Provider and FMSA Legal Name	Program Provider and FMSA NPI or API	Program Provider and FMSA TIN	Program Provider and FMSA Provider Number	Service Area
PHC	Smith Home Care Agency LLC	9999999999	999999999	9999999	Region 11

Field Name	Instructions
Program	Click the Program field and then select the program from the drop-down list.
Program Provider and FMSA Legal Name	Enter the organization's legal name.
Program Provider and FMSA NPI or API	Enter the National Provider Identifier or Atypical Provider Identifier.
Program Provider and FMSA TIN	Enter the Taxpayer Identification Number.
Program Provider and FMSA Provider Number	Enter the Provider Number.
Service Area	Enter the HHSC Region, Catchment Area, LMHA or LIDDA Service Area.

Member Information

Member Information	
Member Name	Medicaid Member ID
Marie Hernandez	999999999

Field Name	Instructions
Member Name	Enter the member's name that received services.
Medicaid Member ID	Enter the nine-digit Medicaid ID for the member.

Correction Request Information

Correction Request Information					
EVV Visit ID	EVV Visit Date	Incorrect Data Element	Incorrect Data Element Information	Correct Data Element Information	Reason for Data Element Correction
99999999	10/22/2021	Bill Hours	Agency Billed for 3	Units Should be 0	Agency Over Billed Units

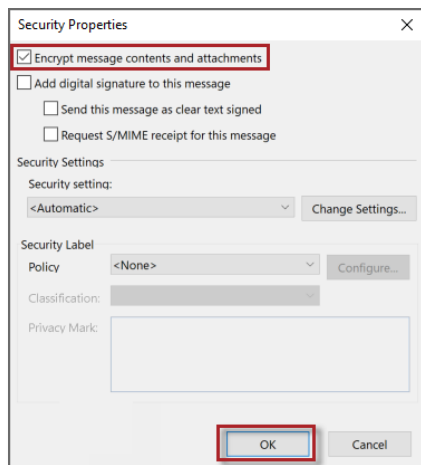
Field Name	Instructions
EVV Visit ID (Column I)	Enter the EVV visit ID.
EVV Visit Date (Column J)	Enter the EVV visit date.
Incorrect Data Element (Column K)	<p>Click the Incorrect Data Element field. Click the drop-down arrow and select an incorrect data element from the drop-down list. Only approved data element options allowed for corrections are included in the drop-down list.</p> <p>Multiple corrections for one visit will require multiple line submissions.</p> <p>Note: 'N/A – Export Only' may be selected for situations when a visit has been corrected but not exported to the EVV Aggregator because the visit is locked.</p>
Incorrect Data Element Information (Column L)	Enter the incorrect data currently showing in the EVV system.
Correct Data Element Information (Column M)	Enter the data element that will show in the EVV system after the correction has been made.
Reason for Data Element Correction (Column N)	Enter the reason for the data element correction.

Payer Use Only

Instructions: Do not enter any information in fields that payers must complete (Yellow fields).

PAYER USE ONLY	
Approval Status	Reason for Denial
Approved	

- When you are done entering data in the Visit Maintenance Unlock Request, save the completed request (Excel spreadsheet) to your local drive. Do not save the file as a PDF; payers deny PDF requests.
 - Click **File > Save As**.
 - Click **Browse** to select the save location; then click **Save**.
- Attach the Visit Maintenance Unlock Request to an email. In the email, include a contact name, email address and phone number. Encrypt the email before you send it. Email encryption instructions vary, depending on the email program used. Search "How to encrypt an email" in the Help section of your email program for instructions. Visit Maintenance Unlock Request emails not sent securely could result in a Health Insurance Portability and Accountability Act (HIPAA) violation and the payer will deny the request.
 - How to Encrypt an Email in Microsoft Outlook:** In the email message, click **File > Properties**. Click **Security Settings**, and then select the **Encrypt message contents and attachments** check box. Click **OK**; then close the window. Compose your email message; then click **Send**. Example:



- **If Not Able to Send a Secure Email:** If you're not able to send a secure email, you can request one from the payer. Refer to payer emails in step #7. Once the payer has sent the secure email, you can reply to the secure email with the attached Visit Maintenance Unlock Request.
7. Send the secure email, along with the Visit Maintenance Unlock Request, to your payer.
 - If HHSC is your payer: Send to evv@hhs.texas.gov.
 - If an MCO is your payer: Send to your MCO. MCO emails are included on page 4 of the [EVV Contact Information Guide for Program Providers and FMSAs \(PDF\)](#).
 8. The payer will deny the Visit Maintenance Unlock Request if it is incomplete or missing required information, if it cannot be opened by the payer, or if it was not sent through a secure method.

If the payer approves your Visit Maintenance Unlock Request, the payer will send it to the EVV vendor or EVV Proprietary System Operator (PSO) within three business days. EVV vendors/PSOs have 10 business days to validate the information submitted and complete visit maintenance or schedule a meeting with the program provider or FMSA to complete visit maintenance. The EVV PSO determines the time frame for completing visit maintenance.

If the information submitted is incorrect, invalid, or missing data elements, the EVV vendor or EVV PSO will:

- Not unlock EVV visit transaction(s) for visit maintenance.
- Return the Visit Maintenance Unlock Request to the program provider or FMSA.
- Notify the payer, program provider, or FMSA why the EVV visit transaction(s) cannot be unlocked for visit maintenance.

EVV vendors/EVV PSOs cannot provide specific information regarding what data should be updated. They can only direct the program provider or FMSA as to which visit dates and members are approved within the Visit Maintenance Unlock Request.

Common Visit Maintenance Unlock Request Examples

Example 1: Request to Change Bill Hours

Scenario: Program provider Jamie Davis needs to unlock a visit to make a correction to the bill hours to match the actual hours provided to the member during service delivery. Visit Maintenance Unlock Request Example:

Correction Request Information					
EVV Visit ID	EVV Visit Date	Incorrect Data Element	Incorrect Data Element Information	Correct Data Element Information	Reason for Data Element Correction
99999999	10/22/2021	Bill Hours	Agency Billed for 3	Units Should be 0	Agency Over Billed Units

Important Notes for Requests to Increase Bill Hours:

- Bill hours may be downward adjusted if the actual hours worked captured in the EVV system are incorrect, or if the program provider or FMSA intends to bill Medicaid for less time than actual hours worked in the EVV system.
- The EVV vendor or PSO may deny a Visit Maintenance Unlock Request to increase the number of bill hours if it goes over the authorized amount of hours linked to a member. Bill hours may never be increased beyond the actual hours worked.

Example 2: Request to Document Actual Clock In, Clock Out Time, or Both

Scenario: FMSA Heidi Gonzalez needs to unlock two visits to document the actual clock in time of the service provider and the actual clock out time of the service provider because Bill Time In and Bill Time Out are incorrect on the visits in the EVV system. Visit Maintenance Unlock Request Example:

Correction Request Information					
EVV Visit ID	EVV Visit Date	Incorrect Data Element	Incorrect Data Element Information	Correct Data Element Information	Reason for Data Element Correction
99999999	8/8/2023	Bill Time Out	Incorrect Bill Time Out: 12:00 PM	Update Bill Time Out to: 11:00 AM	Service provider clocked out late by mistake
99999998	8/3/2023	Bill Time In	Incorrect Bill Time In: 8:17 AM	Update Bill Time In to: 8:00 AM	Time incorrect in EVV system

Important Note: Select **Reason Code** as the incorrect data element if the clock in and/or clock out times need to be corrected.

Example 3: Request to Enter a Visit Manually

Scenario: FMSA Lucy Hawkins needs to enter a visit manually into the EVV system because there were system errors and the clock in and clock out times were not electronically captured when the service provider tried to clock in and clock out. Visit Maintenance Unlock Request Example:

Correction Request Information					
EVV Visit ID	EVV Visit Date	Incorrect Data Element	Incorrect Data Element Information	Correct Data Element Information	Reason for Data Element Correction
N/A	6/8/2023	Bill Hours	Clock in and Clock out was unavailable	Clock in Time: 8:00AM Clock out Time: 2:00 PM	Technical Issues with the EVV System

Important Notes: Manual visits must be entered into the EVV system within the visit maintenance time frame. Payers will only approve Visit Maintenance Unlock Requests to enter a visit manually if the reason for creating a manual visit is due to payer or EVV system error and supporting documentation must be provided along with the Visit Maintenance Unlock Request. Examples of documentation include, but are not limited to:

- Screenshots from EVV system showing error pop ups, documentation of email communications between the service provider, program provider, FMSA and/or vendor (or other stakeholder) explaining the issue/error and indicate the actual time worked (EVV system error documentation)

- Emails or other communications showing a delay in authorization/Medicaid eligibility renewal or anything else that would support your request (EVV payer error documentation)

Example 4: Request to Export a Visit

Scenario: Program provider Landon Hill has several rejected EVV visit transactions due to member ineligibility. The service provider provided services to the member. A back-dated authorization was received from the payer after the visit maintenance time frame. The visit transactions were already verified, and only need to be exported to the EVV Aggregator. No corrections are needed. Visit Maintenance Unlock Request Example:

Correction Request Information					
EVV Visit ID	EVV Visit Date	Incorrect Data Element	Incorrect Data Element Information	Correct Data Element Information	Reason for Data Element Correction
99999999	12/1/2021	N/A - Export Only	N/A	N/A	Re-export is needed, no data correction. Received updated authorization.
99999998	12/2/2021	N/A - Export Only	N/A	N/A	Re-export is needed, no data correction. Received updated authorization.
99999997	12/3/2021	N/A - Export Only	N/A	N/A	Re-export is needed, no data correction. Received updated authorization.

Important Note: N/A – Export Only may be selected for situations when a visit has been corrected but not exported to the EVV Aggregator because the visit is locked.

Questions Regarding Visit Auto-Verification or Visit Exceptions?

Contact your EVV vendor or PSO. Refer to the [EVV Contact Information Guide for Program Providers and FMSAs \(PDF\)](#) for contact information.