Vesta® Consumer Directed Verification (CDV)

Contents

Introduction

Welcome to Vesta CDV!

Vesta was launched in 1996 as a comprehensive compliance management system for Texas community care provider agencies. In 2015, Vesta was one of five Electronic Visit Verification (EVV) Vendors awarded a contract by the Texas Health and Human Services Commission (HHSC). Today, Vesta EVV is the most widely used EVV system and Medicaid software management program in the State of Texas.

Vesta Consumer Directed Verification (CDV) is an easy solution for CDS employers to manage, verify, and approve time worked for a Consumer Directed Services (CDS) member. Vesta CDV application operates 100 percent in a browser environment and is accessible from anywhere through an internet connection. Vesta CDV may be accessed from any device running an operating system.

The following pages provide a detailed view of Vesta CDV and how efficiently the system fulfills the Texas HHSC EVV compliance requirements.

The Vesta Training team is focused on sharing resources with users accessing Vesta CDV so that they may have the knowledge and know-how to navigate and fully utilize the Vesta EVV software system. Vesta EVV is a compliance-oriented system and will assist users in meeting their goals. Training tools, documentation, and a LIVE Customer Support center are available to field questions, provide guidance, and offer support to Vesta EVV users.

Vesta EVV Roles

Role	Description
CDS Member	• Eligible for Medicaid • Receives services covered by EVV • Assigned an EVV Member ID by Vesta
CDS Employee	• Delivers services to members • Clocks in to start a service visit and clocks out to end a service visit • Assigned an EVV ID • May choose to allow use of smartphone for EVV Mobile Application
CDS Employer	• Provides training and supervision to CDS employees • Documents CDS employer's EVV participation choice on Form 1722, Employer's Selection for Electronic Visit Verification • Selects what visit verification method will be used by CDS employees to clock in and clock out • Manages EVV visits in Vesta Consumer Directed Verification (CDV) when applicable
Financial Management Services Agency	• Provides EVV policy training to CDS employers • Manages CDS member, CDS employer, Designated Representative (DR) and CDS employee profile data in the EVV system • Required to use EVV for validating service delivery in EVV-relevant programs

(FMSA)	• Will have claims matched against EVV visit data before payment is processed

Vesta EVV User	• FMSA staff who use Vesta EVV for:
	   ○ CDS Member Profile Management
	   ○ CDS Employee/Employer Profile Management
	   ○ Authorization Management
	   ○ Payer Profile Management
	   ○ Visit Verify Visit Maintenance
	   ○ Vesta EVV Reporting

Vesta EVV Administrative User	• FMSA staff with Administrative User Role
	   ○ Adds user accounts to Vesta for access
	   ○ Creates user roles and assigns to users
	   ○ Edits user accounts as needed
	   ○ Resets user passwords as needed
	   ○ Deletes user accounts within 24 hours of termination
	   ○ Acts as a primary contact for Vesta EVV Support

Payer Users	• Texas Health and Human Services Commission (HHSC)
	• Texas Medicaid & Healthcare Partnership (TMHP)
	• Managed care organizations (MCO)
	   ○ Aetna Better Health (ABH)
	   ○ Amerigroup (AGP)
	   ○ Blue Cross Blue Shield (BCBS)
	   ○ Children's Medical Center Health Plan (CMCH)
	   ○ Cigna Health Spring (CHS)
	   ○ Community First Health (CFH)
	   ○ Cook Children's Health Plan (CCHP)
	   ○ Driscoll Children's Health Plan
	   ○ Molina Healthcare of Texas (MOL)
	   ○ Superior Health Plan (SHP)
	   ○ Texas Children's Health Plan (TCHP)
	   ○ United Health Group (UHG)
	• Used for monitoring EVV system data

EVV Aggregator	• Accepts or rejects EVV visits from EVV vendor each night • Compares incoming service claims against EVV visit data • Forwards accepted visits and claims to payers for adjudication • Maintains standard reports for FMSAs
Vesta EVV Customer Support Specialists	• Available from 7:00 a.m. to 8:00 p.m., Central Time (CT) • After hours support messages logged after 8:00 p.m. (CT) • CDS Customer Support toll-free number: 877-329-3574 • Contact: support@vestaevv.com
Vesta Training Specialists	• Conduct weekly live online webinar trainings • Conduct live regional Vesta Tour of Texas workshops
Vesta Alternative Device Support Specialists	• Manage alternative device orders for FMSAs • Assign and activate alternative devices for CDS members • Process and ship alternative devices to CDS employers • Receive damaged or inoperable alternative devices • Provide support for alternative devices
Third Party	• Implement third-party system integration

Support Specialists	• Provide support for third-party system interfacing • Contact: interfacesupport@vesta.net

DataLogic Management and Leadership	• Available for meetings with FMSAs and CDS employers to discuss escalated issues
	• Manage customer support escalations
	• Participate in state EVV workgroup meetings
	• Contact information:
	    ○ 1605 West Tyler Avenue, Harlingen, Texas 78550
	    ○ 956-412-1424
	    ○ www.vestaevv.com

Accessing Vesta CDV

Vesta Consumer Directed Verification (CDV) operates 100 percent in a browser environment and is accessible from any internet web browser with an internet connection. Vesta CDV can be accessed from any personal computer, tablet, or smartphone connected to the internet.

Logging in to Vesta CDV

1. CDS employers will go to the Vesta website **https://cdv.vestaevv.com**.
2. From the Sign In page, enter the **Username** and **Password**.

Usernames and Passwords are initiated by the FMSA. If you have not received user credentials, contact your FMSA. Password resets can only be completed via the **Forgot Password?** link or by reaching out to the FMSA Administrator.

3. Select **Login**.
   a. If the password is not available or remembered by the user, click **Forgot Password?** (The email address entered must be associated with the username.)
   b. An email will be sent to the user with a link to reset the password.

Navigating Vesta CDV

Vesta CDV is composed of the following sections for CDS employers to manage CDV data.

- Home
- My Profile
- My Visits
- Create Visits
- Reports
- Alternative Devices
- Trainings

Home

The Home section contains important information for all CDS employers and designated representatives. Information in the Home section is updated on a regular basis and users are encouraged to review the latest news and publications regularly.

My Profile

The **My Profile** section contains important information necessary for EVV processes. Details include Member EVV IDs, CDS Employee EVV IDs and Mobile App PIN, and EVV toll-free numbers.

Note: If the CDS employer is assigned to multiple CDS members, they must select each CDS member to view the complete profile.

User Information

The **User Information** section contains the CDS employer's username, email, and Member EVV ID. The CDS employee will reference the EVV ID when clocking in and clocking out for the CDS member.

Note: A CDS employer who is not the member must select the CDS member to view CDS member eligibility, services, and CDS employees assigned to the member.

User Information

👤 **CDS Member Name:** Sharon Austin

👤 **Username:** shaustin@5503   🪪 **EVV ID:** 105

✉️ **Email:** shaustin@vesta.net   📞 **Phone:** 956-555-5555

📍 **Address:** 1605 W Tyler Ave, Harlingen, TX 78550

♿ **Accessibility:** Off

Toggle Accessibility
Change Password
Update Profile

Update Profile

1. Select Update Profile to update the following items:
   a. Username
   b. Email
   c. Phone
2. Address/City/State/Zip Code
3. Select **Confirm** to save the changes. Selecting **CANCEL** would cancel changes and keep the current user information.

Changing Password

1. Under User Information, select **Change Password**.
2. Enter the new password and then confirm the new password.
3. Select **Confirm** to save the change. An email will be sent indicating the password changed. Select **Cancel** to cancel the change.

Toggle Accessibility

The Toggle Accessibility option enables visual cues for users who may have difficulty perceiving color differences.

1. Click **Toggle Accessibility** to turn accessibility on or off.

Vesta CDV meets the WCAG 2.1 A & AA certification as certified by Criterion 508 Solutions, Inc., a company that specializes in website accessibility.

Provider Information

The **Provider Information** section contains the FMSA Agency ID. The CDS employer will be asked to provide this ID when calling customer support so the FMSA can be identified and the call may be documented accordingly.

The CDS employee will use the EVV toll-free phone numbers (English or Spanish) displayed in this section to call when clocking in and clocking out from the landline or using an alternative device. The CDS employer needs to provide the EVV toll-free phone number to their CDS employee(s) when conducting employee training on how to use the landline or alternative device.

HHSC Form 1722

HHSC Form 1722, Employer's Selection for Electronic Visit Verification Responsibilities documents the CDS employer's choice of EVV responsibilities. The CDS employer will choose the appropriate EVV responsibility option that best meets their needs and the FMSA documents the option selected in their Vesta System.

Provider Information

🏠 Agency ID: 5503

📞 EVV Phone Numbers:

    English: 1-855-555-5555

CDS Employer EVV Responsibilities documented on Form 1722 on 04/01/2020:

    Option 1: Perform all required visit maintenance and approve employee's time worked in the EVV system.

Eligibility

The **Eligibility** Section contains the CDS member's eligibility information provided daily from TMHP (if applicable). Any discrepancies should be reported to the FMSA.

My Eligibility

Medicaid Eligibility:

    Start Date: 01/01/2018   End Date: 12/31/9999

    Coverage code: Program Code:

Payer Enrollment:

    Payer: TMHP   Plan Code / Region Code: 66 / 11

    Start Date   End Date:

Services

Services contains the authorized services for the CDS member. This authorization information is managed by the FMSA.

My Services

Payer: HHSC Fee For Service LTC Programs

Program: CLASS

Vesta Service Account Number: 110

Service: CDS RESPITE IN HOME

Start Date: 06/01/2020

End Date: 12/31/9999

CDS Employees

CDS employees contains all CDS employees assigned to the CDS member. This information is also managed by the FMSA. This section contains the Employee's EVV ID and their Vesta Mobile PIN.

My CDS Employees

EVV ID	CDS Employee	Mobile Pin
100	DAVIS, ELIZABETH	12345

CDS Employee Visit Verification Methods

Vesta EVV provides three dependable and user-friendly solutions to verify visits and comply with the HHSC EVV requirements. A CDS employee may use more than one visit verification method for a single visit. For example, a visit may start at the member's home where the CDS employee used the landline telephone to clock in but ended in the community where the CDS employee used the Vesta Mobile Application to clock out.

Landline Telephone

The Vesta Landline Telephone Interactive Voice Response (IVR) system provides a quick and reliable way for CDS employees to verify their visit using the member's home landline telephone. Each FMSA and the FMSA's

CDS employers are assigned a Vesta toll-free number for both English and Spanish (other languages are available upon request).

Alternative Device

Alternative devices are small electronic devices that allow CDS employees to validate their visits when the member does not have a home landline or is not using the Vesta Mobile Application.

Vesta Mobile Application

The Vesta Mobile Application makes it easy for CDS employees to log their visits using a smartphone, especially while out in the community. The Vesta Mobile Application is free to download and available for iPhone® and Android® devices.

Landline Telephone

The landline method uses the member's Caller ID to electronically verify service delivery.

From the member's landline telephone, the CDS employee must call the assigned toll-free number and enter their employee EVV ID at the start and end of the shift. The system will advise the employee the time of the clock in and time of the clock out so the visit hour(s) can be documented.

The FMSA is responsible for documenting the CDS member's landline telephone number in Vesta EVV.

Alternative Device

The alternative device is provided at no cost by Datalogic and used by CDS employees to document visits. The alternative device is assigned to a member and must always remain in their home. The alternative device is shipped to the CDS employer's address.

The alternative device continuously displays a unique six-digit number on the screen that is always visible. The displayed six-digit number represents a specific date and time.

The alternative device six-digit unique number changes every 60 seconds. Every 10 seconds, a new line is displayed to the left of the six-digit number that indicates how much time is left before the number will change.

When clocking in and clocking out using this method, alternative device values may be:
• Called in real-time.
• Called in later (values are valid for seven [7] days).
• Manually entered by program provider staff.
• Entered in the Vesta Mobile Application.

Instructions on how to order the Alternative Device are in the Alternative Device Process Guide for Vesta CDS Employers in the Trainings section.

Vesta Mobile Application

The Vesta Mobile Application is an option CDS employers can offer to their CDS employees to document service delivery visit data, such as visit date, visit start and end times, visit location, identity of the CDS employee, and identity of the member receiving services.

The Vesta Mobile Application allows a CDS employee to utilize their own smartphone to clock in and clock out for visits. Per HHSC policy, the CDS employer may authorize the CDS employee to use the CDS employer's smartphone to clock in and clock out with the Vesta Mobile Application.

The Vesta Mobile Application may be downloaded for free from the Apple® Store or Google® Play Store for use on Apple® iPhones® or Android® devices.

The Vesta Mobile Application provides benefits for both the CDS employer and the CDS employee. It represents an easier, faster, and more reliable method for EVV because it helps reduce data entry errors. Visit

information is sent to Vesta Mobile, and CDS employee and member EVV identifiers are memorized and stored in drop-down lists, eliminating manual data entry after the first visit.

The FMSA can authorize or unauthorize the use of the Vesta Mobile Application for each CDS employee. When authorized, the CDS employee must be provided the Agency ID, their EVV ID, and the Vesta Mobile Pin number by the FMSA or CDS employer.

Note: A CDS employee may use more than one visit verification method for a single visit. For example, a visit may start at the member's home where the CDS employee used the landline telephone to clock in but ended in the community where the CDS employee used the Vesta Mobile Application to clock out.

Additional training materials on how to clock in and clock out using each of visit verification method can also be found in the Training section and the Home Section.

Shift Criteria to Auto-Link a Visit (when using a schedule)

The EVV system utilizes information gathered from calls to generate visit(s) when a visit was not pre-scheduled or to link to a previously scheduled visit. When specific shift criteria are met for a visit, that visit will be generated and will not require visit maintenance.

Landline Telephone

- Caller ID must match the phone number listed under EVV Landline Phone in the member profile tab
- CDS employee EVV ID must match
- Member EVV ID must match
- EVV total worked hours must match the scheduled hours

Alternative Device

- CDS employee EVV ID must match
- Member EVV ID must match

- Valid Device Value (Time <u>In</u> Value)
- Valid Device Value (Time Out Value)
- EVV total worked hours must match the scheduled hours.

Vesta Mobile Application

- CDS employee EVV ID must match
- Member EVV ID must match
- EVV total worked hours must match the scheduled hours.

Exceptions

When one or more of the required shift criteria is not met, this is called an **Exception** and will require visit maintenance. Visits must be manually verified by the CDS employer or the FMSA, depending on the HHSC Form 1722 option selected.

Exceptions may occur when the CDS Employee:
- Calls from a phone number not registered to any member in the EVV system.
- Is not able to or forgets to clock in, clock out, or both.
- Delivers service outside the home without use of the Vesta Mobile Application.
- Enters an incorrect EVV ID for the employee or the CDS member.
- Enters an alternative device value that was not validated by the EVV system.

Visit Maintenance

Visit maintenance is the process of making corrections to certain data elements that were not captured by the EVV system. CDS employers and FMSAs have 60 calendar days from the date of service to complete visit maintenance.

Note: Visit maintenance that needs to be completed outside of the 60-calendar day window, or data element corrections outside of the 60-calendar day window, MUST be submitted directly to the appropriate payer for approval.

The Vesta EVV system electronically documents the following data for each visit:
- CDS member (Individual) receiving services
- CDS employee providing services
- Location of service delivery
- Date of service delivery
- Time the CDS employee begins and ends service delivery

When a CDS employee provides authorized services to a CDS member in the home or the community, the CDS employee must clock in to the Vesta EVV system when services begin, and clock out of the EVV system when services end using an approved electronic verification method (landline, alternative device, or mobile method). When the CDS employee cannot clock in or clock out, the CDS employer or the FMSA must perform visit maintenance to document the visit in the EVV system.

All situations that require documentation must be done according to program policy.

My Visits

As CDS employees are clocking in and clocking out for each visit, **My Visits** is where CDS employers identify visits that occurred, approve visits, or perform visit maintenance when applicable.

Figure 1. Pending Visits

The legend below explains each component from figure 1.

1. **Filters** – The user can filter by date range, employee, CDS member, if applicable, and select **Apply**.
2. **Icon Legend** – Icons identify the status of the visit and method used to clock in and clock out.
3. **Pending Visits** – When CDS employees' clock in and clock out, visits are shown in the pending visits.
4. **Action Button** – The **Action** button is a drop-down menu to view the visit, edit the visit, change the program and service, or create a visit memo.

Visit Maintenance Responsibilities

HHSC Form 1722 requires that a CDS employer select an option for EVV visit maintenance responsibilities.

The following options are provided on the form:

OPTION 1: I will enter my approval of the time my CDS employee worked in the EVV system and I will perform visit maintenance in the EVV system.

OPTION 2: will enter my approval of the time my CDS employee worked in the EVV system. I delegate the performance of visit maintenance to the FMSA. After the FMSA completes visit maintenance, I will enter my approval in the EVV system of any changes to time worked made by the FMSA, if necessary, as part of visit maintenance.

OPTION 3: The FMSA will confirm my approval of the time my CDS employee worked in the EVV system. I delegate the performance of EVV visit maintenance to the FMSA.

The visit maintenance process will vary based on the option selected. This guide will provide steps on how to verify visits based on each option.

HHSC Form 1722 Option 1

CDS employer performs all visit maintenance and approval of time worked.

When the CDS employer has elected to perform visit maintenance and approve their CDS employee's time worked in the EVV system, they will perform these functions using the **Vesta Consumer Direction Verification (CDV) system**. The full Vesta CDV guide is available in the Vesta FMSA dashboard as well as in the **Training** section of the Vesta CDV system.

Visit Verification

There are two ways a visit can be verified in Vesta CDV.

Approve Visit – The CDS employer can approve the visit as it is, without having to complete visit maintenance. By approving the visit, the CDS employer has determined that all data elements are correct, and no changes need to be made.

Visit Maintenance – Certain EVV visit data must be corrected to accurately reflect the delivery of service. This process is referred to as "completing visit maintenance." EVV visit maintenance allows the CDS employer to edit the following data element(s) of an EVV visit:

- Billable hours
- CDS employee
- Program and services
- Service delivery location
- Reason code(s) and free text

Approving a Visit – Vesta CDV

1. From the **My Visits** section in CDV, check the box to the left of the visit.
2. The **Approve Visits** button appears at the top of the visits (see figure 1).
3. Once all visits that need to be approved have been selected, select **Approve Visits**.
4. The approved visit record will be updated for FMSA review. The FMSA may review the visits and coordinate changes with the CDS employer if necessary. Because the CDS employer has selected Option 1, the FMSA cannot make changes to a visit.

Figure 1- Approving a Visit

Visit Maintenance

Figure 2 shows a visit that has a Time In but is missing a Time Out, therefore, visit maintenance is required to verify the visit.

1. From the **My Visits** section, to the right of the visit that needs to be verified, use the action button dropdown, and select **Edit Visit**.
2. Complete the required fields:
- **Hour and Minutes** – Documents the actual time worked for the visit.
- **Program/Services** – Documents the program/services associated with the visit.
- **CDS Employee** – Documents the CDS employee that worked the visit.
- **Visit Location** – Indicates the location of the clock out.
- **Reason Code** – An EVV reason code is a standardized HHSC approved three-digit number and description that is used during visit maintenance to explain the specific reason a change was made to an EVV visit record. CDS employers must use the most appropriate EVV reason code(s) when clearing each exception generated by the EVV system. Certain EVV reason codes require the user to enter free text such as the actual clock in and clock out time. For specific questions regarding reason code usage, contact your FMSA or HHSC.
3. Once all required fields have been completed, check the **Approve Visit box**, and then select **Save and Approve**.
4. The approved record will be updated for FMSA review. The FMSA may review the visits and coordinate changes with the CDS employer if necessary.

Create Visit

There may be situations when a CDS employer must manually create a visit due to no visit records are showing to approve or perform visit maintenance on, although services were provided.

Common reasons for this include but are not limited to:

- The CDS employee failed to clock in and clock out.
- The CDS employee did not enter valid EVV IDs when clocking in and clocking out.
- The CDS employee provided services outside the home but does not use the Vesta Mobile Application.

How to Create a Visit

1. From the CDV menu, select **Create Visit**.
2. The CDS employer must complete all the required fields and select the appropriate reason code(s).
3. Once all required fields have been completed, select **Create and Approve Visit**.
4. The approved record will be updated for FMSA review. The FMSA may review the visits and coordinate changes with the CDS employer if necessary.

FMSA Visit Review

As CDS employers are approving visits and performing visit maintenance, an FMSA user may review the visits and accept them or work with the CDS employer to make changes. The FMSA will review all verified visits in their Vesta EVV system.

CDS employer approves the visit, completes visit maintenance, or amends the visit.

The FMSA reviews the approved visit and confirms the visit or advises the CDS employer to amend the visit.

The confirmed visit moves the verified visit bin and may be marked to export.

Visit Memos

FMSAs and CDS employers can utilize **Visit Memos** on EVV visits as a means of communication. Visit memos created by the FMSA on EVV visits can be seen by CDS employers and CDS employers can also create or reply to existing Visit Memos.

1. From **My Visits**, click the action button next to the visit then select **Visit Memo**.
2. Review an existing memo or type out desired memo and select **SAVE.**
3. Any visit with a memo will have the memo icon.

1722 OPTION 2

FMSA Completes Visit Maintenance and CDS Employer Approves Time Worked.

When the CDS employer has selected the FMSA to perform visit maintenance, but the CDS employer will approve their CDS employee's time worked in the EVV system, the FMSA will use Vesta Web and the CDS employer will use Vesta CDV.

CDS Employer Approving Time Worked – No Visit Maintenance

When a CDS employer reviews visits that do not require visit maintenance, they may approve the visit by following the steps from Approving a Visit.

The FMSA will not need to perform visit maintenance and can review and confirm the visit in their EVV system.

FMSA Visit Maintenance

If a visit requires visit maintenance, the FMSA will complete this process in their EVV system. The CDS employer is responsible for communicating to the FMSA by phone, email, or fax so the FMSA can complete the visit maintenance completely and accurately.

CDS Employer Approving Time Worked – After Visit Maintenance

If the FMSA performed visit maintenance, the CDS employer must review the change and approve the visit or contact the FMSA to discuss further changes that are needed.

A visit that has been verified through visit maintenance is marked red and contains the Review FMSA Changes icon.

The following steps demonstrate how to review and approve a visit after visit maintenance has been completed.

1. Select the **Action** button on the visit and select **View Visit**.
2. Review the **Visit Details**. The verification details from the FMSA are provided on the right side of the view visit screen.
   a. If the visit details are complete and accurate, select **Approve**.
   b. If changes need to be made, select **Cancel** and advise the FMSA of the applicable changes.
3. If approved, the visit is marked as approved and appears in the **Approved** tab in Vesta CDV.

View Visit

VERIFICATION
Billable Hours: 3hrs 0mins
Non-Evv Hours: 0hrs 0mins
CDS Employee: JESSICA GONZALEZ
Reason Code(s):
RC 900: Failure to call out
RC 900 Comment: Actual Time Out: 11:45 description
Verified By: User, Sample -on- 07/08/2020 11:02 AM

Visit Date
07/06/2020

CDS Employee
GONZALEZ, JESSICA

Program / Service
HHSC Fee For Service LTC Programs - PHC - CDS CFC PAS/HAB

Visit Time In **Visit Time Out**

Actual Time In **Device Used**
10:05 am   Landline

Location In
Member Home

Actual Time Out **Device Used**

Location Out
Member Home

Actual Hours **Actual Rounded Hours**
0hrs 0mins   0.00

Billable Hours **Created By**
3.00   Visit Gen Visit Gen

Cancel   Approve

1722 OPTION 3

FMSA completes all required EVV visit maintenance AND my FMSA will confirms attendant's time worked.

When the CDS employer has selected for the FMSA to perform visit maintenance and approve the attendant's time worked in the EVV system, the FMSA will use Vesta Web to complete visit maintenance and approve visits.

The CDS employer will be responsible for providing approval documentation of time worked for any applicable CDS employee.

Reports

CDS employers will have access to standard EVV reports through the **Reports** section in Vesta CDV. EVV standard reports only include EVV visit transactions accepted by the EVV Aggregator. EVV standard reports will be considered the source of truth and used for contract monitoring, recoupments, and enforcement purposes.

Vesta CDV Reporting

The following reports are available directly from Vesta CDV. When a user requests one of the reports, it is pulled directly from the Vesta CDV system and available to the user.

- **EVV Alternative Device Order Status –** used to verify that alternative devices have been ordered by the FMSA on behalf of the CDS employer, and to track the status of those orders.

- **EVV CDS Service Delivery Log –** shows accepted EVV visit transactions for visits for a requested date range.

- **EVV Landline Phone Verification –** shows the phone number, phone type, and carrier used by a CDS employee to clock in or clock out using the home landline. Each month DataLogic runs a process to identify and categorize phone types for all unique landline phone numbers used to verify visits using the landline method. The phone type information associated with the unique phone number will be accessible to program providers

- **Non-EVV Relevant Time Logged –** shows time that was spent on non-EVV services between clock in and clock out for a requested date range.

- **EVV Service Delivery Exception Report –** shows the number of visits that varied from the schedule or authorization, as well as the number of visits that were not approved, for a requested date range.

Generating a CDV Report

The following steps demonstrate how to request a report from Vesta CDV.

1. From the CDV menu select **Reports**.
2. Select the desired report from the menu (reports contained in Vesta CDV are the first five reports).

3. Enter the applicable filters.

4. Select the option to generate the report.
    a. Generate PDF – This option provides a PDF version of the report which may be printed.
    b. Generate CSV – This option generates a comma separated values (CSV) file which may be opened and printed if applicable.

Note: Printing reports and accessing CSV files may require hardware or software that is not provided by Datalogic.

TMHP EVV Portal Reporting

The following reports are provided through the TMHP EVV Portal and are downloaded in Vesta CDV through the report request.

- **EVV Attendant History –** shows the attendant identified on accepted EVV visit transactions that delivered services to a member for a requested date range.

- **EVV Clock In/Clock Out Usage –** shows the number of accepted EVV visit transactions by an attendant, the number of times each method (Mobile, GUI, etc.) was used to clock in or clock out, as well as the number of visits that were auto-verified.

- **EVV Reason Code Usage and Free Text –** shows the count of Reason Code number and description combinations and associated free text/comments used on accepted EVV visit transactions for a member and requested date range.

- **EVV Units of Service Summary –** displays a calendar view summary at the service level of the number of units delivered each day on accepted EVV visit transactions for a member and requested date range.

Generating a TMHP EVV Portal Report

The following steps demonstrate how to request a TMHP report from Vesta CDV.

1. From the CDV menu select **Reports**.

2. Select the desired report from the menu (reports pulled from the EVV portal are the last four reports).

3. Enter the applicable filters.

4. Select the option to request the report.
    a. **Generate PDF** – This option will request a PDF version of the report from TMHP.
    b. **Generate Excel** – This option will request an Excel® version of the report from TMHP.
    c. **Generate CSV** – This option will request a csv file from TMHP.

5. Once requested, a Report Request Successful notification appears stating "The report request was successfully sent to TMHP. You can access the report in the **Prior Report Requests** section. It may take up to 24 hours for reports to generate." Click **OK** to continue.

6. Because report generation can take up to 24 hours, a history of requests is kept in the system and used to generate a "**Prior Report Requests**" list. Here the user can view the reports they have requested, including checking if the latest report is ready.
    a. If a report has been generated and is in the system, the report will be opened in a new tab if the type is PDF and downloaded if the type is CSV.
    b. If a report has yet to be generated the system notifies the user, the report is not yet ready.

Training

Training content is accessed in the **CDV Menu**, under Trainings. Content includes guides, videos, and links for webinar training.

Customer Support

For Vesta CDV technical assistance, CDS employers or FMSAs may call our customer support team.

For Live Customer Support:
CDS Customer Support Toll Free Number:
877-329-3574 (Monday – Friday 7 a.m. - 8 p.m., CT)

Customer Support Email:
support@vestaevv.com

Alternative Device Support Email:
tokens@vestaevv.com

Please be sure to always include the following:
*   FMSA Agency ID Number (Located in **My Profile** section)
*   FMSA Name
*   Contact Information (name, phone number, and email address)
*   A brief description of the assistance needed

Training Department:
training@vestaevv.com
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