

What is EVV?

Why is it required?



Phone Number: (877) 903-0832
Email: infoCDTX@consumerdirectcare.com


Welcome to EVV policy training.

What is EVV?

- Electronic Visit Verification (EVV) electronically documents and verifies service delivery.
- Electronic Visit Verification (EVV) replaces paper time sheets.



It's now so easy for caregivers to clock in and out and keep track of the services provided. No more paper timesheet, manually tracking hours, or having the EOR sign off each day. This virtual timekeeping process is called Electronic Visit Verification, or EVV. EVV is a computer-based system that electronically documents and verifies service delivery, it replaces paper time sheets. When a caregiver arrives at a Client's home and is ready to start working, they can clock in on their own mobile device that is connected to the internet. Like a smartphone or tablet. And when they are finished providing care, while still at the Client's home, they can log back in and clock out.

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1. Type of service
 2. Name of the recipient
 3. Date and Times of beginning and end of visit
 4. Location
 5. Name of Caregiver
 6. Other information determined necessary to ensure accurate payment of Medicaid claims



The EVV system captures and verifies 6 things in order to confirm service delivery.

1. the type of service provided – this is the service authorization
2. the name of the recipient for whom the service is provided
3. the date and times the caregiver began and ended the visit – the clock in and out times
4. the location, including the address, at which the service was provided
5. the name of the individual who provided service – the caregiver, and
6. Any other information the commission determines is necessary to ensure the accurate payment of Medicaid claims



Why is EVV required?

- Federal law requires that all states use EVV for Medicaid personal care services.



Federal law now requires that all states use EVV for Medicaid personal care services, including services delivered through the Consumer Directed Services (CDS) option. Consumer Direct Network Texas uses Vesta to track EVV visits and services. Services that require EVV must be documented in Vesta to be paid.

What if I fail to use the EVV system?

- Caregivers will experience a delay in payment.
- You may be required to:
 - take additional training,
 - complete a corrective action plan, or
 - leave the CDS option to use a provider agency.



Any Consumer Direct Care Network Texas caregiver refusing to use Vesta to clock in and out and verify services provided will experience a delay in payment. It may also result in the care recipient taking additional training, completing a corrective action plan, or leaving the CDS option and using a provider agency for EVV required services.



Ensure your Caregivers are using Vesta to clock in and out.



It's very important that your Caregivers are using the EVV system to clock in when services begin and clock out when services end.

What are your EVV responsibilities?

- Complete Form 1722, Employer's Selection for EVV Responsibilities and send it to CDTX.
- Complete Training for
 - EVV policy, and
 - Vesta (EVV system).
- Determine the best way for your Caregivers to clock in and out and train them.



As with timesheets, you also have some responsibilities when it comes to Electronic Visit Verification. YOU will need to complete and sign Form 1722, which you can access by clicking the link on this page. The completed form needs to be sent to your Consumer Direct TX. You'll also need to complete EVV policy training and training on the EVV system Vesta. You'll want to determine the best clock in and out methods for your caregivers and train them to do it correctly.

Responsibilities, cont.

- Use Form 1732, Management & Training of Service Provider to maintain training records.
- Approve time worked by your Caregivers.
- Perform visit maintenance based on your Form 1722 selection.
- Train Caregivers to use Vesta correctly to clock in and clock out.



You'll want to use Form 1732, which you can get using the link on this page, to maintain training records for your caregivers. You'll want to approve time and perform any visit maintenance regularly as well as be sure you and your caregivers know how to use Vesta and are using it correctly to clock in and out.

EVV Steps for CDS Employers



Next we'll go through 6 steps for CDS Employers.

1

Complete Form 1722 - Employer's Selection for EVV Responsibilities

WHEN?

- Upon enrollment in the CDS option.
- Any time you request a change in designation of EVV responsibilities.



Step one is to complete Form 1722. If you didn't get the form from the previous page and you need the link, please click the button. Form 1722 needs to be completed at the time of EVV implementation of a program or service delivered, upon enrollment, or any time you request a change in designation of EVV responsibilities.

Choose one of the three options

for completing visit maintenance and approving time worked.

- 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: I 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.



There are 3 options to choose from on Form 1722 regarding how to complete visit maintenance and how to approve time worked. Let's look more closely at these 3 options.

Option 1

- 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.

As the CDS Employer, you will have access to the Vesta portal to approve, deny, or make changes to caregiver shifts.

*This will need to be done in a timely manner.



Option 1 gives you the most control over your services. This options gives you access to the Vesta web portal to approve, deny, or make changes to shifts in real time. If you choose option 1, you eliminate the use of paper, making it a seamless and easy process to get your caregivers paid.

Option 2

- Option 2: I 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.

As the CDS Employer, you will have the ability to approve accurate shifts in the EVV system. CDTX will require a signed attestation to make changes or corrections on your behalf.



The second option is to have Consumer Direct TX complete any visit maintenance for you, but still approve Caregiver time worked yourself in Vesta. Again, it will need to be done in a timely manner.

Option 3

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.

As the CDS Employer, you will still approve accurate shifts, but you will not have access to the EVV system. CDTX will require signed paper attestations for all EVV administrative actions done on your behalf.



The third option is to have Consumer Direct TX complete both visit maintenance and time approval. This will be based on documentation from you and CDTX will not be able to approve anything without it.

2

Complete all EVV trainings:

- EVV Policy
- EVV System

Training requirements vary depending on which option you selected on your Form 1722.

If you selected
OPTION 1

Form 1722 Option – If the CDS employer selected:	EVV Training Requirement	Provided By
Option 1: The CDS employer agrees to perform all visit maintenance and approve their employee's time worked in the EVV system.	<ul style="list-style-type: none"> • Full EVV System Training • Clock in and clock out methods • EVV Policy Training 	<ul style="list-style-type: none"> • EVV Vendor or EVV PSO (your FMSA) • EVV Vendor or EVV PSO (your FMSA) • Payer (HHSC or MCO) or your FMSA

Step two is to complete all required EVV trainings. If you'd like to see HHSC's training policy, please click the button at the top of this page. Training requirements will depend on which option you selected on your Form 1722. If you selected option 1, you're required to learn the EVV system, Vesta, as well as how to clock in and clock out so that you can teach your caregivers. You will also be responsible for completing EVV policy training.

2

Complete all EVV trainings:

- EVV Policy
- EVV System

Training requirements vary depending on which option you selected on your Form 1722.

If you selected
OPTION 2

Form 1722 Option – If the CDS employer selected:	EVV Training Requirement	Provided By
Option 2: The CDS employer elects to have their FMSA complete all visit maintenance on their behalf; however, the CDS employer will approve their employee's time worked in the EVV system.	<ul style="list-style-type: none"> • Full EVV System Training • Clock in and clock out methods • EVV Policy Training 	<ul style="list-style-type: none"> • EVV Vendor or EVV PSO (your FMSA) • EVV Vendor or EVV PSO (your FMSA) • Payer (HHSC or MCO) or your FMSA

If you selected option 2, you will still need to learn the EVV system, Vesta, as well as how to clock in and clock out so that you can teach your caregivers. You will also still be responsible for completing EVV policy training.

2

Complete all EVV trainings:

- EVV Policy
- EVV System

Training requirements vary depending on which option you selected on your Form 1722.

If you selected
OPTION 3

**Form 1722 Option –
If the CDS employer
selected:**

Option 3: The CDS employer elects to have their FMSA complete all visit maintenance on their behalf and confirm the employee's time worked in the EVV system based on approval documentation from the CDS employer.

**EVV Training
Requirement**

- Overview of EVV System
- Clock in and clock out methods
- EVV Policy Training

Provided By

- EVV Vendor or EVV PSO (Your FMSA)
- EVV Vendor or EVV PSO (Your FMSA)
- Payer (HHSC or MCO) or FMSA

If you selected option 3, you will need an overview of the EVV system, Vesta, and you'll need to learn about clocking in and out so that you can verify time when sending documentation to CDTX to approve. You will still be responsible for completing EVV policy training.

3

Train Caregivers how to clock in and clock out.

You must complete training on Vesta before using the EVV system, then once a year after that.

**Be sure you have received login credentials from a Vesta "NoReply" email address.

Once you have completed the training for Vesta, you can:

- Determine the best clock in/out methods for your Caregivers, and
- Train your Caregivers on how to clock in/out.



Step three will be to train your caregivers how to use the EVV system to clock in and out. It will be important that you complete your own training, and also to have received login credentials, before training your caregivers. Once you know how to use the Vesta EVV system, you can determine the best clock in and clock out methods for your caregivers, and you can train your caregivers on how to do it.

4

Use the Vesta EVV system.

CDTX needs to have your most current information available to set up your use of Vesta.

Your Caregivers must clock in at the beginning of their shift and clock out at the end using an approved method.

- Mobile Device
- Landline
- Alternative Device



Step four is to use the EVV system. Please make sure that CDTX has all your current information to set up your account in Vesta, then your caregivers must clock in and the beginning of every service delivery and clock out at the end using one of the approved methods: Vesta on a mobile device, a landline, or an alternative device.

Mobile Method

**The mobile method is the only option when delivering services in the community.

- Your Caregivers may use their own personal smartphone or tablet, or one owned by you with your permission.
 - The device must have an internet connection and GPS capabilities.
- Vesta Mobile can be downloaded from the App Store or the Google Play Store as an app on your smartphone or tablet.



The mobile method uses a smartphone or tablet with an internet connection to download an app from the app store or Google play. This can be the caregiver's personal device, or with your permission, it can be your device. Please note that when delivering services in the community, the mobile method is the only option.

Mobile Method, cont.

- The Mobile Method does:
 - record the specific location at the exact time of clocking in/out.
- The Mobile Method does NOT:
 - track location before clocking in, during the visit, or after clocking out,
 - use mobile device plan minutes or data, or
 - store Protected Health Information (PHI) on your mobile device.



The mobile method will use GPS to track location, but only at the exact time of clocking in and clocking out. It will not track location before, during, or after the visit. When using Vesta on your smartphone or tablet, it does not use up minutes or data on your mobile device plan and it will not store PHI on any mobile device.

Landline

- With your approval, your Caregivers may use your home phone as a clock in/out method.
 - Home phones used to clock in/out **MUST** be a landline telephone.
- The Caregiver will call a toll-free number to clock in/out and the EVV system will recognize from where they are calling, the caregiver will follow the prompts to clock in/out.
 - If services are delivered in different locations, alternate phone numbers may be entered.



Caregivers may also clock in using a landline telephone, with your approval. The caregiver will call a toll-free number to clock in, the EVV system will recognize your home telephone number and register that the caregiver is at your home, then they will follow the prompts. They will repeat this process when clocking out. It is important you CDTX always has your most current phone number, and the phone numbers of any other locations where services may be delivered.

Alternative Device

- The alternative device is an approved electronic device that produces an unique code on the screen that is always visible.
 - The device must remain in your home.
- Your Caregiver may use a toll-free number to call in the code that displays when they begin/end services. The codes will be valid for 7 days.



If neither the mobile method or the landline method is available, you may choose an alternative device. This device is an approved electronic device placed in your home that must stay in your home. It will display a unique 6 digit code, that will change every 60 seconds. Your caregiver will note the code when beginning and ending services, then they will have up to 7 days to call a toll-free number and report the code to clock in and clock out.

Alternative Device

- If an EVV method is not available prior to the delivery of an alternative device, you are responsible for manually documenting shifts as described in the EVV visit maintenance policy.



If neither the mobile method or the landline method is available, you may choose an alternative device. This device is an approved electronic device placed in your home that must stay in your home. It will display a unique 6 digit code, that will change every 60 seconds. Your caregiver will note the code when beginning and ending services, then they will have up to 7 days to call a toll-free number and report the code to clock in and clock out.

Placement of the Alternative Device in Your Home

- You and your Caregivers should agree on where the device is placed in your home.
 - The device should be in a location where it is accessible to the Caregivers at all times.
- The device may NOT:
 - be mounted to a location that may be dangerous to you or a Caregiver, or
 - cause damage to your home.
- Some examples:
 - Kitchen counter
 - Coffee table
 - Refrigerator or cabinet door handle



Because an alternate device must remain in your home, it is important that you and your caregivers agree on where it will be placed. It should be somewhere that is accessible to everyone at all times. Make sure that if it is mounted or zip tied to a location that it is not dangerous to you or your caregivers and that it does not cause damage to your home. Some examples of where it could be placed are on a counter, a coffee table, or attached to a refrigerator or cabinet door handle.

Multiple Clock in/out methods

- A Caregiver may use more than one method to clock in and clock out of the EVV system.
 - For example, the caregiver may clock in using the mobile app and then clock out using your landline telephone.
- A Caregiver must record the visit beginning or ending outside your home by either:
 - using the mobile method, or
 - manually documenting the visit as described in the EVV Visit Maintenance policy.



There are a couple of things to note: a caregiver may use more than one method to clock in or out of the EVV system. For example, they may clock in using the mobile app if you're out in the community, but then choose to clock out on your landline because they don't have good cell phone reception in your home. And if a visit does begin or end outside the home, a caregiver must use the mobile method, or manually document the visit as described in the EVV Visit Maintenance policy.

Clocking in and out for Non-EVV Services

There are two options for documenting a non-EVV service that occurs during an EVV visit.
* you will determine how your Caregivers will clock in/out when delivering EVV and non-EVV services.

- **Option 1:** Clock into the EVV system and clock out when the non-EVV service begins. Clock back into the EVV system when the non-EVV service has ended.
- **Option 2:** Remain clocked into the EVV system while delivering the non-EVV service and document the amount of time spent on the non-EVV service.



There are two options for documenting a non-EVV service that occurs during an EVV visit, it will be up to you to determine how your caregivers will clock in/out when delivering EVV and non-EVV services. The first option is that the caregiver can just clock out of EVV when the non-EVV service begins, then clock back in when it has ended. The second option is to remain clocked into the EVV system and just document the amount of time spent on the non-EVV service.

Transportation

- Transportation is authorized and budgeted differently than other Medicaid services.
- Transportation will be documented and submitted on a Non-EVV timesheet.



If transportation is part of your services, it will need to be documented and submitted as a Non-EVV service.

Scheduling

- Scheduling Caregivers is optional for members who choose the COS option.
 - Vesta training will provide instructions on the use of the EVV system with or without schedules.
- **Schedules can potentially reduce the need for visit maintenance.



You may choose to schedule your caregivers or not. Vesta training will provide instructions on how to include schedules into the EVV system. If you do choose to schedule your caregivers, this can reduce the need for visit maintenance.

EVV Reports

**Access to EVV reports may not be accessible if you selected option 3 on Form 1722.

- State staff, MCOs, and CDTX can also view EVV reports and will use them for EVV compliance.
 - For questions on reports, or access to reports in Vesta, please contact CDTX.



There are several reports that can be accessed in the EVV system. We will go through several of these and explain what they are used for. These reports will only be available to you if you selected option 1 or 2 on Form 1722. If you selected option 3 you will not have access to the EVV system or its reports and will need to contact CDTX if looking for the information on a certain report. State staff, MCOs – insurance companies – and CDTX can view these reports and will use them to check EVV compliance.

EVV Reports

EVV Alternative Device Order Status Report

- Used to verify that alternative devices have been ordered and tracks the status of those orders.

EVV Attendant History Report

- Verifies which Caregivers provided services to you for a requested date range.



First is the EVV Alternative Device Order Status Report. This is accessed when you've requested an alternative device for Caregivers to clock in and out and it will verify that the device has been ordered and track the shipment of the device. The EVV Attendant History Report will verify which Caregivers provided services to you during a specific date range as requested.

EVV Reports, cont.

EVV CDS Service Delivery Log

- Displays EVV visit information within a requested date range.
 - This log is the primary timekeeping document to record service delivery for CDS EVV required services and is reviewed to make sure EVV service delivery is correct.
 - This log is similar to Form 1745-Service Delivery Log with Written Narrative/Written Summary.
- **For questions on the requirement for the Service Delivery Log, please contact CDTX.



The EVV CDS Service Delivery Log is an important report similar to Form 1745, Service Delivery Log with Written Narrative/Written Summary. Just as paper timesheets were checked in the past, this report is used as the primary timekeeping document to record service delivery. If you have questions about this report you can contact CDTX for help.

EVV Reports, cont.

EVV Landline Phone Verification Report

- Displays the phone number used for clock in/out and is used to conduct EVV landline telephone compliance.
- **This report will show if the number being used to clock in/out is a cell phone or a pay phone.



The EVV landline phone verification report displays phone numbers used when a caregiver is clocking in or out using a landline telephone. Since the phone used for the landline method must be a landline in your home, this report will verify that the phone number is not a cell phone or a pay phone.

EVV Reports, cont.

Non-EVV Relevant Time Report

- Displays the Caregiver's time spent on non-EVV services during each visit for a requested date range.
- **This report will not show the specific non-EVV service, only the total hours spent on all non-EVV services.



The non-EVV relevant time report displays the caregiver's time spent on non-EVV services. It will not show the specific services delivered, only the total hours spent on all non-EVV services.

5

Conduct Visit Maintenance.

Visit Maintenance is only relevant to you if you selected option 1 on Form 1722.

- Visit Maintenance allows edits to certain data elements in an EVV visit transaction. Visit Maintenance is conducted by:
 - correcting visit errors from EVV system validations,
 - adjusting pay hours, and
 - adding reason codes as required.
- If you will be completing visit maintenance (option 1), you will receive training on how to do it in the Vesta EVV system.



Step five is about visit maintenance. Depending on your selection on Form 1722, this may or may not be your responsibility. If you selected option 2 or option 3, visit maintenance will be the responsibility of CDTX. If you selected option 1, you will receive training on how to conduct visit maintenance using the Vesta EVV system. Visit maintenance allows edits to certain data elements in an EVV visit transaction. Visit Maintenance is conducted by correcting errors, adjusting hours, and adding reason codes.

Reason Codes

- Any edits made to data in Vesta as a result of Visit Maintenance requires a reason code. These codes explain the specific reason why a change was made to an EVV visit. More than one EVV reason code can be used.
- An explanation in the free text field may be required when entering certain reason codes.

Some reason codes are as follows.

Reason Code *
100 - General Variation
150 - Duplate
151 - Emergency
190 - Incomplete Data
201 - Mobile Device
300 - Technical Issues
400 - Location Not Available
100 - Service Suspension
600 - Other
900 - Non-Preferred



Reason codes are required when edits are made to data in Vesta as a result of visit maintenance. These codes explain the specific reason why a change was made to an EVV visit. It's important to note that more than one reason code may be used. Some reason codes require an explanation in the free text field, these reason codes include 101-Emergency, 600-other, and 900-non-preferred. On the right of this screen you can see an examples of some of the reason codes used in Vesta.

Free Text

Free text is additional information entered to further describe the need for visit maintenance.

- Free text must be entered during visit maintenance when:
 - the shift is missing a clock in time, a clock out time, or both (enter the actual missing clock in/out time).

• Example:

```

Date: 05/01/2020 12:51PM      User: PM61Aname@PM61A.com
Reason code: 900 Non-Preferred
Description: C - Failure to call in and out
Notes: Actual clock in was 11:24PM, actual clock out was 11:59PM

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- using the following reason codes:
 - 101-Emergency
 - 600-Other
 - 900-Non-preferred



Free text is additional information entered to further describe the need for visit maintenance. For example, when a shift is missing a clock in or out time, it's important to include the actual times in the free text area when manually adding the shift in visit maintenance. Or if you use certain reason codes, like emergency, other, or non-preferred, it is required that you include an explanation in the free text area.

Reason Codes, cont.

- When the same reason code is used for the same member more than 14 calendar days in a month, this may constitute misuse of an EVV reason code.
 - If an EVV reason code is used more than 14 times in a calendar month for the same member, the 15th day, and each day thereafter, must include an explanation.



If you have a Caregiver who refuses to use the EVV system, it may be tempting to continue to use visit maintenance to continually enter your Caregiver's shifts. However, when the same reason code is used for the same member more than 14 calendar days in a month, this may constitute misuse of visit maintenance and EVV reason codes. It is your responsibility to make sure your Caregivers are clocking in and out using the Vesta EVV system. This is why if a reason code is used more than 14 times in a calendar month for the same member, an explanation must be included beginning the 15th day, and every day thereafter.

Visit Maintenance Timeframes

- A claim for a visit that required visit maintenance must be completed before the claim can be paid.
 - You will have 95 days from the time of service to complete visit maintenance.
- After the timeframe has passed, you must contact HHSC or the appropriate MCO to request visit maintenance be opened in order to edit the EVV visit transaction.
 - Approval to open visit maintenance is at the discretion of the payer and determined on a case-by-case basis.



There will be a certain timeframe for which you are allowed to complete your visit maintenance. If a claim for a visit requires visit maintenance and it is not completed on time, it is possible that the claim will not be paid. If the timeframe has passed and you need the visit maintenance to be opened on a specific visit, you will need to contact your payer for approval.

6

Review & Approve Time.

You are always responsible for reviewing and approving time worked by your Caregivers.

- This process looks different depending on which option you selected on Form 1722.
- Options 1 & 2: Log into the Vesta web-based portal to manage and approve shifts.
- Option 3: Submit a paper EV Attestation form verifying that your Caregivers have worked the times for which they clocked in/out. CDTX will approve shifts upon receipt of attestation.



It is your responsibility to review and approve time for your caregivers, which is Step 6. This will look differently if you selected Options 1 or 2 on Form 1722 than if you selected Option 3. If you selected Option 1 or 2, please use Vesta to review and approve time. If you selected Option 3, you will review and approve time outside the EVV system. Please contact CDTX to discuss this process.

EVV Resources

Consumer Direct Texas

- EVV Training Materials: consumerdirecttx.com/training-materials
- Email: infoCDTX@consumerdirectcare.com
- Phone: 877-903-0832



On this page you will find a list of EVV resources. You can click on and access any in blue text. Please save any web pages you may need in the future.

This concludes your EVV policy training. Please contact CDTX if you have any follow up questions.