Electronic Visit Verification Training Requirements Checklists

Electronic Visit Verification (EVV) Training Checklists are included for program providers, Financial Management Services Agencies (FMSAs), Consumer Directed Services (CDS) employers and service providers (service attendants and CDS employees) required to use EVV. The programs, services and service delivery options required to use EVV is located on the [Texas Health and Human Services Commission (HHSC) EVV website](#).

For more information and details about EVV training requirements, refer to the HHSC EVV Training Policy. The HHSC EVV Training Policy requires program providers, FMSAs and CDS employers to complete all required EVV training prior to using either an EVV vendor system or an EVV proprietary system and yearly thereafter.

Training Checklists

Use the applicable checklist to track EVV training requirements and completion of requirements. Click on the applicable option below or scroll throughout the document to access a checklist:

Agency Service Delivery Option

- [EVV Training Checklist for Program Providers](#)

- [EVV Training Checklist for Service Providers (Service Attendants)](#)

CDS Service Delivery Option

- [EVV Training Checklist for FMSAs](#)

- CDS employers should access the appropriate EVV training checklist below, based on the option selected on [Form 1722, Employer's Selection for Electronic Visit Verification Responsibilities](#):

  ‣ [EVV Training Checklist for CDS Employers – Option 1 Chosen on Form 1722](#)

  ‣ [EVV Training Checklist for CDS Employers – Option 2 Chosen on Form 1722](#)

  ‣ [EVV Training Checklist for CDS Employers – Option 3 Chosen on Form 1722](#)

- [EVV Training Checklist for Service Providers (CDS Employees)](#)

EVV Training Checklist for Program Providers

EVV Training Requirement	Taken By	Provided By	Training Completion

EVV System Training	**EVV system users**	• **EVV vendor** - If using an EVV vendor system
		  o Contact your EVV vendor for EVV system training opportunities: EVV Vendor Contact Information
		• **EVV Proprietary System Operator (PSO)** – If using an EVV proprietary system
		  o Contact your PSO training contact for EVV system training opportunities: PSO Training Contact Information
			Complete **one** option below:
			• EVV vendor system training
			• EVV proprietary system training

EVV Portal Training	**EVV system users and billing staff**	**Texas Medicaid and Healthcare Partnership (TMHP)** Contact evv@tmhp.com for EVV Portal training opportunities.	Complete at least **one** option below: • TMHP EVV computer-based training (CBT) course on the TMHP Learning Management System • EVV Portal live webinar training • EVV Portal in-person training • Other training option approved by TMHP
EVV Policy Training	**EVV system users and billing staff**	**Payer (HHSC or MCO)** Contact HHSC EVV at EVV@hhs.texas.gov or your MCO (see Contact Information Guide) for EVV policy training opportunities.	Complete at least **one** option below: • EVV policy training course on the HHS Learning Portal (CBT or webinar recording) • EVV policy live webinar training • EVV policy in-person training • Other training option approved by your payer

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EVV Training Checklist for Service Providers (Service Attendants)

EVV Training Requirement	Taken By	Provided By	Training Completion
Clock In and Clock Out Methods	**Service providers (service attendants)**	**Program provider** Contact your program provider for training opportunities.	EVV clock in and clock out methods training

EVV Training Checklist for FMSAs

EVV Training Requirement	Taken By	Provided By	Training Completion
EVV System Training	**FMSA EVV system users**	• **EVV vendor** - If using an EVV vendor system ‣ Contact your EVV vendor for EVV system training opportunities: [EVV Vendor Contact Information](#) • **EVV Proprietary System Operator (PSO)** – If using an EVV proprietary system ‣ Contact your PSO training contact for EVV system training opportunities: [PSO Training Contact Information](#)	Complete **one** option below: • EVV vendor system training • EVV proprietary system training
EVV Portal Training	**FMSA EVV system users and FMSA billing staff**	**Texas Medicaid and Healthcare Partnership (TMHP)** Contact evv@tmhp.com for EVV Portal training opportunities.	Complete at least **one** option below: • TMHP EVV computer-based training (CBT) course on the [TMHP Learning Management System](#) • EVV Portal live webinar training • EVV Portal in-person training • Other training option approved by TMHP
EVV Policy Training	**FMSA EVV system users, FMSA billing staff**	**Payer (HHSC or MCO)** Contact HHSC EVV at EVV@hhs.texas.gov or your MCO (see [Contact Information Guide](#)) for EVV policy training opportunities.	Complete at least **one** option below: • EVV policy training course on the [HHS Learning Portal](#) (CBT or webinar recording) • EVV policy live webinar training • EVV policy in-person training • Other training option approved by your payer

EVV Training Checklist for CDS Employers – Option 1 Chosen on Form 1722, CDS Employer's Selection for Electronic Visit Verification Responsibilities

CDS employers should complete the checklist below if Option 1 was chosen on Form 1722.

EVV Training Requirement	Taken By	Provided By	Training Completion

• **Full EVV System Training**
• **Clock In and Clock Out Methods**
	CDS employers	• **EVV vendor** - If using an EVV vendor system
		  ‣ Contact your EVV vendor for EVV system training opportunities: [EVV Vendor Contact Information](#)
		• **EVV Proprietary System Operator (PSO)** – If using an EVV proprietary system
		  ‣ Contact your FMSA for EVV system training opportunities.
			Complete **one** option below:
			• EVV vendor system training
			• EVV proprietary system training
			
			NOTE: FMSAs select the EVV system used by CDS employers. Contact your FMSA if you are not sure which EVV system training option is needed.

EVV Policy Training	**CDS employers**	**Payer (HHSC or MCO) or FMSA** Contact HHSC EVV at EVV@hhs.texas.gov your MCO (see [Contact Information Guide](#)), or your FMSA for EVV policy training opportunities.	Complete at least **one** option below: • Initial EVV Policy Training for CDS Employers computer-based training (CBT) course on the [HHS Learning Portal](#) • EVV Policy Training – Webinar Recordings course on the [HHS Learning Portal](#) • EVV Policy live webinar training hosted by your payer • EVV Policy in-person training hosted by your payer • EVV Policy training provided by your FMSA • Other training option approved by your payer

EVV Training Checklist for CDS Employers – Option 2 Chosen on Form 1722, CDS Employer's Selection for Electronic Visit Verification Responsibilities

CDS employers should complete the checklist below if Option 2 was chosen on Form 1722.

EVV Training Requirement	Taken By	Provided By	Training Completion
• **Full EVV System Training** • **Clock in and clock out methods**	**CDS employers**	• **EVV vendor** - If using an EVV vendor system ▸ Contact your EVV vendor for EVV system training opportunities: [EVV Vendor Contact Information](#) • **EVV Proprietary System Operator (PSO)** – If using an EVV proprietary system ▸ Contact your FMSA for EVV system training opportunities.	Complete **one** option below: • EVV vendor system training • EVV proprietary system training **NOTE:** FMSAs select the EVV system used by CDS employers. Contact your FMSA if you are not sure which EVV system training option is needed.
EVV Policy Training	**CDS employers**	**Payer (HHSC or MCO) or FMSA** Contact HHSC at EVV@hhs.texas.gov, your MCO (see [contact information guide](#)), or your FMSA for EVV policy training opportunities.	Complete at least **one** option below: • Initial EVV Policy Training for CDS Employers computer-based training (CBT) course on the [HHS Learning Portal](#) • EVV Policy Training – Webinar Recordings course on the [HHS Learning Portal](#) • EVV Policy live webinar training hosted by your payer • EVV Policy in-person training hosted by your payer • EVV Policy training provided by your FMSA • Other training option approved by your payer

EVV Training Checklist for CDS Employers – Option 3 Chosen on Form 1722, CDS Employer's Selection for Electronic Visit Verification Responsibilities

CDS employers should complete the checklist below if Option 3 was chosen on Form 1722.

EVV Training Requirement	Taken By	Provided By	Training Completion

• **Overview of EVV System**
• **Clock In and Clock Out Methods**
	CDS employers	• **EVV vendor** - If using an EVV vendor system
		  ‣ Contact your EVV vendor for EVV system training opportunities: [EVV Vendor Contact Information](#)
		• **EVV Proprietary System Operator (PSO)** – If using an EVV proprietary system
		  ‣ Contact your FMSA for EVV system training opportunities.
			Complete **one** option below:
			
			• EVV vendor system training
			• EVV proprietary system training
			
			NOTE: FMSAs select the EVV system used by CDS employers. Contact your FMSA if you are not sure which EVV system training option is needed.

EVV Policy Training	**CDS employers**	**Payer (HHSC or MCO) or FMSA** Contact HHSC EVV at EVV@hhs.texas.gov, your MCO (see [Contact Information Guide](#)), or your FMSA for EVV policy training opportunities.	Complete at least **one** option below: • Initial EVV Policy Training for CDS Employers computer-based training (CBT) course on the [HHS Learning Portal](#) • EVV Policy Training – Webinar Recordings course on the [HHS Learning Portal](#) • EVV Policy live webinar training hosted by your payer • EVV Policy in-person training hosted by your payer • EVV Policy training provided by your FMSA • Other training option approved by your payer

EVV Training Checklist for Service Providers (CDS Employees)

EVV Training Requirement	Taken By	Provided By	Training Completion
Clock in and Clock Out Methods	**Service providers (CDS employees)**	**CDS employer** Contact your CDS employer for training opportunities.	EVV clock in and clock out methods training