



# Electronic Visit Verification (EVV)

## Visit Maintenance Unlock Request Job Aid for Consumer Directed Services (CDS) Employers

June 2023

This document is for Consumer Directed Services (CDS) employers that selected Option 1 on Form 1722, Employer's Electronic Visit Verification Responsibilities. It provides step-by-step instructions for CDS employers 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?**

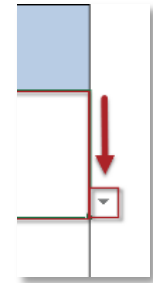
A Visit Maintenance Unlock Request is an Excel spreadsheet template provided by payers on the payers' websites. It must be completed and submitted to your payer in a secure email. When approved, it allows you the opportunity to correct certain data elements on an EVV visit transaction after the visit 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. If corrections need to be made, CDS employers must ensure all required data elements are correct and visit maintenance is complete before Financial Management Services Agencies (FMSAs) submit the EVV claim to the appropriate claims management system.

## Visit Maintenance Unlock Request Process for CDS Employers

1. Access the EVV Visit Maintenance Unlock Request for CDS Employers (Excel) on your payer's webpage.
  - If **HHSC** is your payer: Access the [EVV Visit Maintenance Unlock Request for CDS Employers \(Excel\)](#).
  - If a **managed care organization (MCO)** is your payer: Access the EVV Visit Maintenance Unlock Request for CDS Employers (Excel) from your MCO's website. MCO websites are included on the last page of the [EVV Contact Information Guide for CDS Employers \(PDF\)](#).
2. Open the EVV Visit Maintenance Unlock Request for CDS Employers (Excel).
  - **Tip:** You may need to zoom in to see the items in the drop-down lists. To enlarge the Visit Maintenance Unlock Request, 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 CDS Employer VMUR tab.
  - **CDS Employer VMUR** tab – Use this tab to complete the Visit Maintenance Unlock Request.
4. On the CDS Employer 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:** The Payer, EVV Vendor System, and Incorrect Data Element Information fields display a drop-down arrow on the right side of the fields 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 of drop-down arrow is shown to the right:



## Member, FMSA, Payer, and EVV System Information

Example if using an EVV Vendor System:

### CDS Employers Must Complete the Following:

<b>Member Name</b>	John Jones
<b>Member Date of Birth</b>	5/9/1952
<b>Medicaid Member ID</b>	999999999
<b>Financial Management Services Agency (FMSA) Name</b>	FMSA Name
<b>Payer (Listed on the visit)</b>	HHSC (LTC)
<b>EVV Vendor System</b>	DataLogic/Vesta
<b>Proprietary System Name (If applicable)</b>	

Example if using an EVV Proprietary System:

### CDS Employers Must Complete the Following:

<b>Member Name</b>	Shonda Jones
<b>Member Date of Birth</b>	6/2/1978
<b>Medicaid Member ID</b>	999999998
<b>Financial Management Services Agency (FMSA) Name</b>	FMSA Name
<b>Payer (Listed on the visit)</b>	Blue Cross Blue Shield
<b>EVV Vendor System</b>	Proprietary System
<b>Proprietary System Name (If applicable)</b>	EVV Proprietary System Name

Field Name	Instructions
<b>Member Name*</b>	Enter the member's name that received services.
<b>Member Date of Birth*</b>	Enter the member's date of birth (mm/dd/yyyy).
<b>Medicaid Member ID*</b>	Enter the nine-digit Medicaid ID for the member. The Medicaid ID is located on the service authorization; or you may contact your FMSA for the Medicaid ID.
<b>Financial Management Services Agency (FMSA) Name</b>	Enter the FMSA's name.
<b>Payer (Listed on the visit)*</b>	Click the <b>Payer</b> field. Click the drop-down arrow and select the payer listed on the visit from the drop-down list.
<b>EVV Vendor System</b>	If you are using an EVV vendor system, click the <b>EVV Vendor System</b> field. Click the drop-down arrow and select the EVV vendor system from the drop-down list.
<b>Proprietary System Name</b>	If you are using an EVV proprietary system, enter the EVV proprietary system's name.

\*Member Medicaid and payer information can only be updated by the FMSA.

## 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
777777777	12/21/2021	Reason Code	Incorrect Clock In: 8:15AM	Time In to be communicated in free text: 8:00AM	Add reason code and free text

Field Name	Instructions
<b>EVV Visit ID (Column A)</b>	Enter the EVV Visit ID.
<b>EVV Visit Date (Column B)</b>	Enter the date of service.
<b>Incorrect Data Element (Column C)</b>	<p>Click the <b>Incorrect Data Element</b> 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><b>Note:</b> '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>
<b>Incorrect Data Element Information (Column D)</b>	Enter the incorrect data currently showing in the EVV system.
<b>Correct Data Element Information (Column E)</b>	Enter the data element that will show in the EVV system after the correction has been made.
<b>Reason for Data Element Correction (Column F)</b>	Enter the reason for the data element correction.

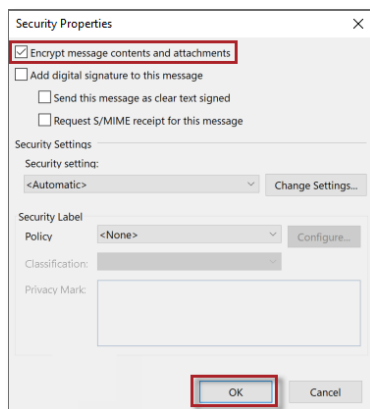
## Payer Use Only

Do not enter any information in fields that payers must complete (yellow fields).

Payers Must Complete the Following:	
FMSA's NPI or API	
FMSA's TIN	
FMSA's Provider Number	
Program	
Service Area	

PAYER USE ONLY	
Approval Status	Reason for Denial
Approved	

5. 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**.
6. Attach the Visit Maintenance Unlock Request to an email. In the email, include a contact name, email address and phone number. **CDS employers must notify their FMSAs in writing when submitting Visit Maintenance Unlock Requests. Copy (CC) your FMSA on the request email.**
7. 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 #8. Once the payer has sent the secure email, you can reply to the secure email with the attached Visit Maintenance Unlock Request.
8. 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](mailto:evv@hhs.texas.gov).
    - If an MCO is your payer: Send to your MCO. MCO emails are included on the last page of the [EVV Contact Information Guide for CDS Employers \(PDF\)](#).
  9. 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 CDS employer 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 CDS employer.
- Notify the CDS employer 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 CDS employer 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:** CDS employer Jamie Davis needs to unlock two visits to make corrections to the bill hours to match the actual hours the CDS employee (service provider) 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
000000000000	4/9/2021	Bill Hours	5.25	4.25	Billing adjustment done; visit not updated in Vesta or TMHP
100000000000	3/26/2021	Bill Hours	3	2.5	The visit was updated in Vesta but the update did not make it to TMHP

#### Important Notes for Requests to Increase Bill Hours:

- 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.
- Bill hours may be downward adjusted if the actual hours worked captured in the EVV system are incorrect, or if the FMSA intends to bill Medicaid for less time than actual hours worked in the EVV system.

## Example 2: Request to Document Actual Clock In and Clock Out Times

**Scenario:** CDS employer Heidi Gonzalez needs to unlock two visits to document the actual clock in time of the CDS employee, the actual clock out time of the CDS employee, and the actual clock in and clock out times of the CDS employee because the times 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	3/8/2023	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	3/10/2023	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 **Bill Time In** or **Bill Time Out** as the incorrect data element if the clock in and/or clock out times are incorrect.

## Example 3: Request to Enter a Visit Manually

**Scenario:** CDS employer 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 CDS employee 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	6/5/2023	Bill Hours	Clock In and Clock Out 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. Examples of documentation include, but are not limited to:

- Screenshots from EVV system showing error pop ups, documentation of email communications between the CDS employer/FMSA and vendor explaining the issue/error (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:** CDS employer 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	12/11/2021	N/A - Export Only	N/A	N/A	Re-export is needed; no data correction. Received updated authorization.
299999999	12/18/2021	N/A - Export Only	N/A	N/A	Re-export is needed; no data correction. Received updated authorization.
399999999	12/11/2021	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 CDS Employers \(PDF\)](#) for contact information.