



ELECTRONIC VISIT VERIFICATION (EVV) USING THE EVV PORTAL

EVV VISIT MAINTENANCE REPORT JOB AID



TEXAS MEDICAID & HEALTHCARE PARTNERSHIP
A STATE MEDICAID CONTRACTOR

v2024_0725

Overview

The Electronic Visit Verification (EVV) Visit Maintenance Report allows payers, such as authorized Texas Health and Human Services Commission (HHSC) and managed care organization (MCO) users, access to a program provider’s or financial management services agency’s (FMSA’s) accepted visits and their associated visit data in the EVV Aggregator.

Payers will use this report as part of the visit maintenance unlock request (VMUR) process if a program provider or FMSA requests to unlock visits that were submitted in their former, or legacy, EVV system. After a program provider or FMSA submits to their payer, the payer will reference the submitted VMUR to enter the required report criteria to generate the report. The report export contains all associated EVV visit data that is later imported and unlocked in the new EVV system, which allows the program provider or FMSA to perform visit maintenance for these visits. For more information, refer to the [Workflow for State Staff and MCOs](#) section in this job aid.

Note: The EVV Visit Maintenance Report is accessible to all MCO users, and select state staff users with EVV Portal admin permissions. For questions, please contact EVV@hhs.texas.gov.

A state staff user view of the EVV Visit Maintenance Report screen. For MCO users, the Payer Name field is defaulted to the user’s organization.

Contents

Workflow for State Staff and MCOs 3

Accessing the Report 4

 Report Criteria Descriptions. 4

Generating a Report 5

 Generating a Report with a Single Visit ID 5

 Generating a Report with Multiple Visit IDs 6

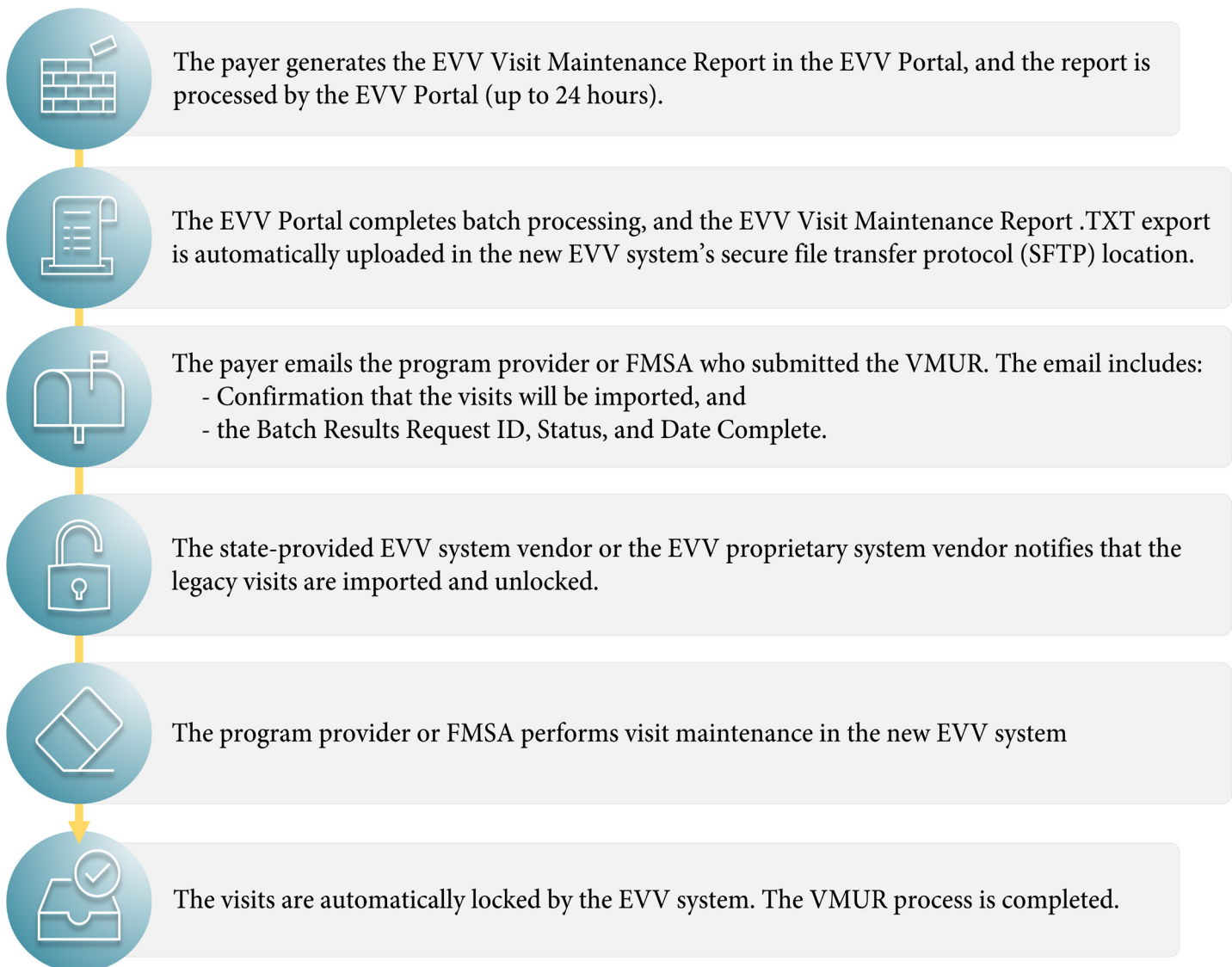
Batch Results and Viewing the Report 7

Error Messages 8

Workflow for State Staff and MCOs

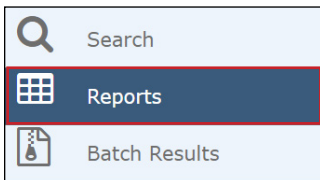
MCOs and state staff that are authorized to generate EVV Visit Maintenance Reports may refer to the following workflow to better understand the how the EVV Visit Maintenance Report can be used in the visit maintenance unlock request (VMUR) process in order for visits that were submitted in a legacy EVV system to be imported into the current EVV system for visit maintenance.

A VMUR process begins with a program provider or FMSA submitting a VMUR to their payer. This request includes information entered by the program provider or FMSA that identifies the visits to be unlocked for visit maintenance. Using the visit information on the VMUR, the payer enters the required report criteria.



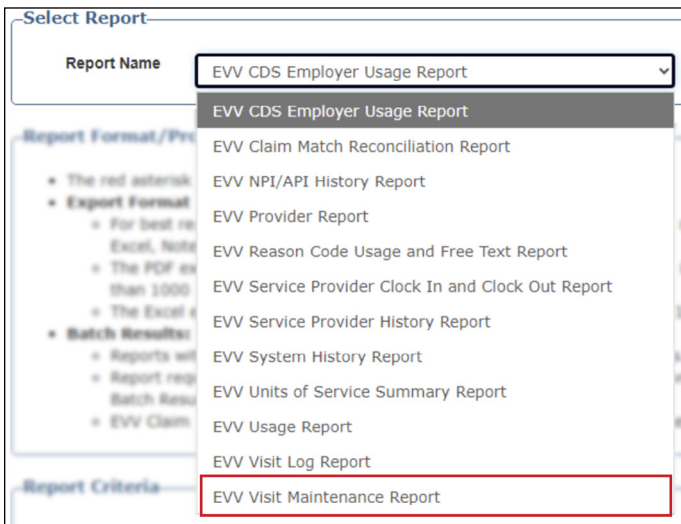
Accessing the Report

Click **Reports** in the left navigation menu.



To access the EVV Visit Maintenance Report, select **EVV Visit Maintenance Report** from the Report Name dropdown list. The EVV Visit Maintenance Report page opens.

Note: Available report selections will vary depending on the user’s EVV Portal permissions.



Report Criteria Descriptions

- NPI/API - The National Provider Identifier (NPI) or Atypical Provider Identifier (API) is a unique 10-digit identification number issued to program providers.
- Visit ID/List of Visit IDs - The EVV Visit Identification (ID) is a unique number assigned to the EVV visit transaction by the EVV system.
- Legacy EVV System Name - The name of the former EVV system that was used to capture or enter the EVV visit.
- New EVV System Name - The name of the current EVV system that will be used to perform visit maintenance on the EVV visit.
- Payer Name - The entity (HHSC or MCO) whose contracted program providers and FMSAs are required to use EVV. This field is defaulted for MCO users.

Note: All report criteria fields in the EVV Visit Maintenance Report are required to generate a report.

Generating a Report

Authorized users will enter varying report criteria, depending on the users intended output may use the EVV Visit Maintenance Report to either:

- Generate a report using a single Visit ID, or
- Generate a report using a list of Visit IDs.

After the user enters the required criteria, the report will be submitted for batch processing in the EVV Portal.

Note: The EVV Visit Maintenance Report export is only available through batch processing and .TXT file format.

Generating a Report with a Single Visit ID

On the EVV Visit Maintenance Report Criteria page, use the following steps to generate a report using a single Visit ID:

- 1) Enter the **NPI/API**.
- 2) Enter the **Visit ID**.

Note: If multiple Visit IDs or more than one, refer to the process in the [Generating a Report using Multiple Visit IDs](#) section in this document.

- 3) Click the **Legacy EVV System Name** dropdown menu. Manually enter or choose the appropriate EVV system from the list.
- 4) Click the **New EVV System Name** dropdown menu. Manually enter or choose the appropriate EVV system from the list.
- 5) For state staff users, select the **Payer Name** dropdown menu and choose the appropriate payer from the list. For MCO users, this field is defaulted to the user's organization.
- 6) To reset the report criteria fields, click **Clear**.
If the information is correct, click **Create Report**. The report will be submitted for batch processing.

Report Format/Processing Information

- The red asterisk (*) indicates a required field.
- Visit ID List should be submitted as an Excel file with one Visit ID per row.
- Visit ID File must contain all Visit IDs that are associated with one NPI/API sent from one Legacy EVV System.
- Only up to 100 Visit IDs are allowed in Visit ID File.
- **Batch Results:**
 - EVV Visit Maintenance Report will only be processed in Batch Results and in Text export format.

Report Criteria

Select Report Parameters

NPI/API *	<input type="text" value="1234567890"/>	Legacy EVV System Name *	<input type="text" value="PreviousSystem"/>
Visit ID/List of Visit IDs *	<input type="text" value="ABC123123123"/>	New EVV System Name *	<input type="text" value="NewSystem"/>
	OR	Payer Name *	<input type="text" value="Health and Hum"/>
	<input type="button" value="Choose File"/> No file chosen		

Select Export Format

Export Formats

Generating a Report with Multiple Visit IDs

Authorized users may generate an EVV Visit Maintenance Report that uses up to 100 Visit IDs that are associated with one NPI/API sent from one legacy EVV system. The user is required to create and upload an Excel file that contains a list of the Visit IDs that will be used for the report. The file must be in Microsoft Excel format and meet the following requirements:

Excel File Requirements
The Visit IDs should be listed in Column A.
The Visit IDs are sorted alphanumerically.
Each Visit ID cannot exceed a 30-character maximum.
The Excel file cannot contain column headers.
The Excel file cannot exceed 100 Visit IDs or 100 rows.
The Excel file cannot exceed 1MB in size.

	A	B	C
1	12345678901		
2	12345678902		
3	12345678903		
4	12345678904		
5	12345678905		
6	12345678906		
7	12345678907		
8	12345678908		
9	12345678909		

If the Excel file does not meet the requirements, the report will not generate. The user must make corrections before another upload attempt is made.

If the Excel file requirements are met and the file is saved, use the following steps to generate the report:

- 1) Enter the **NPI/API**.
- 2) Click the **Legacy EVV System Name** dropdown menu. Manually enter or choose the appropriate EVV system from the list.
- 3) Click the **New EVV System Name** dropdown menu. Manually enter or choose the appropriate EVV system from the list.
- 4) For state staff users, select the **Payer Name** dropdown menu and choose the appropriate payer from the list. For MCO users, this field is defaulted to the user's organization.
- 5) Below the Visit ID/List of Visit IDs field, select **Choose File**. A window appears to select the file to upload.

The screenshot shows a form with the following elements:

- A label "Visit ID/List of Visit IDs" with a red asterisk below it.
- An empty text input field.
- The word "OR" below the input field.
- A "Choose File" button with a red border, which is highlighted.
- The text "No file chosen" next to the "Choose File" button.

- 6) Locate and select the prepared Excel file that contains the list of Visit IDs. Click **Open**.
- 7) If the entered criteria is correct, click **Create Report**. A confirmation window appears. Review the Visit IDs for accuracy before continuing.
- 8) If corrections are needed, click **Refine Search Results** to return to the EVV Visit Maintenance Report Criteria page. If the information is correct, click **Continue**. The report will submit for batch processing.

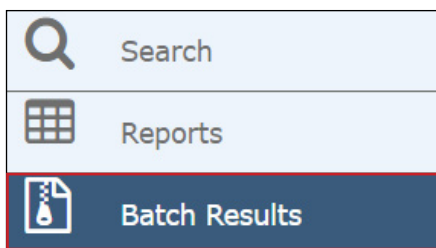
Batch Results and Viewing the Report

Authorized users will use the Batch Results page to:

- Confirm the status of the report's batch processing.
- Document the report's Request ID, Status, and Date Completed and communicate necessary information to the involved VMUR parties.
- (Optional) View and download the processed .TXT export. The .TXT export is automatically uploaded in the new EVV system's SFTP location after the EVV Portal completes batch processing.

To access the report in the Batch Results page, use the following steps:

- 1) Click **Batch Results** located in the left navigation menu. The Batch Results page will appear.



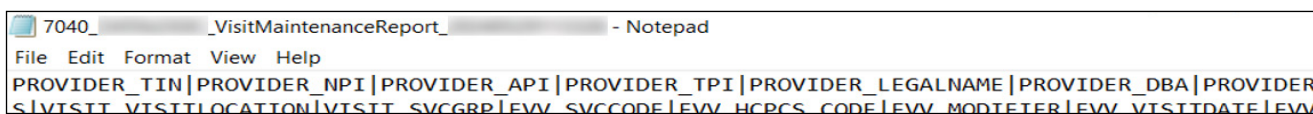
- 2) Locate the report in the Batch Results grid, and refer to the Status column.

- If the Status column displays as *Pending*, please allow additional time for processing. Batch Reports may take up to 24 hours to process.
- If the Status column displays as *Failed*, this indicates that there was a system failure, or the report was too large to generate. The user must resubmit the report request on the EVV Reports page.
- If the Status column displays as *Completed*, this indicates batch processing is completed, and the file has been automatically uploaded to the new EVV system's SFTP location. The new EVV system will proceed to use the file to import the visits.

Note: If the report displays as *Pending* and is deleted by the user, the report will not be uploaded in the new EVV system's SFTP location.

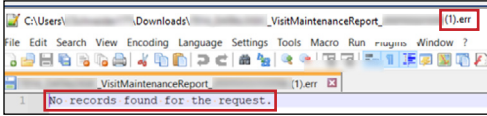
- 3) Notate the information in the Request ID, Status, and Date Completed columns. This information is communicated to the program provider or FMSA and relevant parties. Refer to the [Workflow for State Staff and MCOs](#) section for more information.

While not required, authorized users may download a copy of the .TXT export. To download the .TXT export, select the **Download** link located under the Link column. The report will automatically download to the user's computer. Download links are only available for reports with a *Completed* status.



Error Messages

This section defines the errors that can be encountered when generating or viewing an EVV Visit Maintenance Report.

Error Message or Description	Error Type	Cause and Resolution
<p>No records were found with this request, or “.err” present at the end the downloaded report’s filename.</p> 	Data mismatch	<p>Cause: The Visit IDs did not match the entered NPI/API or Legacy EVV System Name.</p> <p>Resolution: Review the Visit IDs and NPI/API that were entered in the Report Criteria, and make corrections as needed.</p>
NPI/API is a required field.	Required field	<p>Cause: The NPI/API field is blank.</p> <p>Resolution: Enter an appropriate NPI/API and select Create Report if all other information is correct.</p>
Visit ID/List of Visit IDs is a required field.	Required field	<p>Cause: The Visit ID/List of Visit IDs field was blank after the user selected Create Report.</p> <p>Resolution: Enter an appropriate Visit ID or choose an Excel file with a list of Visit IDs and select Create Report if all other information is correct.</p>
Legacy EVV System is a required field.	Required field	<p>Cause: The Legacy EVV System field was blank after the user selected Create Report.</p> <p>Resolution: Enter or select the appropriate legacy EVV system and select Create Report if all other information is correct.</p>
New EVV System is a required field.	Required field	<p>Cause: The New EVV System field was blank after the user selected Create Report.</p> <p>Resolution: Enter or select the appropriate new EVV system and select Create Report if all other information is correct.</p>

Error Message or Description	Error Type	Cause and Resolution
Incorrect NPI/API, NPI/API should be 10 digits.	Format	<p>Cause: The entered NPI/API did not contain the correct formatting.</p> <p>Resolution: Review and correct the entered NPI/API in the Report Criteria screen. Select Create Report if all other information is correct.</p>
The Visit ID File must be an EXCEL File.	File requirement	<p>Cause: The uploaded Visit ID file was an incorrect file type.</p> <p>Resolution: Use Microsoft Excel to create a new Visit ID list that follows the requirements in the Excel File Requirements table.</p>
Visit ID file size must be less than 1MB.	File requirement	<p>Cause: The Excel file size exceeded what is allowed.</p> <p>Resolution: Open the Visit ID Excel file to ensure no other data is present or hidden in the spreadsheet. The Visit IDs should be the only information in the spreadsheet. Refer to the Excel File Requirements table for more information.</p>
The Visit ID File has more than allowed limit i.e., 100 Visit IDs.	File requirement	<p>Cause: The Excel file contained more than 100 Visit IDs.</p> <p>Resolution: Open the Excel file to ensure the included Visit IDs are entered correctly and do not repeat. If the information is correct, but errors persist, consider splitting the Visit IDs into two or more reports.</p>
The Legacy EVV System and the New EVV System cannot be the same.	Incorrect entry	<p>Cause: The user entered the same EVV system in the Legacy EVV System and the New EVV System report criteria fields.</p> <p>Resolution: Enter an appropriate EVV system in the field that is incorrect. An EVV system cannot be both the <i>new</i> and <i>legacy</i> system. Select Create Report if all other information is correct.</p>

Error Message or Description	Error Type	Cause and Resolution
<p>Provider NPI/API is not associated with this EVV System.</p>	<p>Incorrect entry</p>	<p>Cause: The user entered an NPI/API that is not associated with the information entered in the Legacy EVV System Name and/or New EVV System Name fields.</p> <p>Resolution: Review and correct the information in the NPI/API, Legacy EVV System Name, and New EVV System Name fields.</p>