

**Health and Human Services Commission
Electronic Visit Verification (EVV)
Revised Visit Maintenance Unlock Request Timelines**

The Texas Health and Human Services Commission (HHSC) is amending Section 9060 Visit Maintenance Unlock Request, of the Electronic Visit Verification (EVV) Policy Handbook, to revise the visit maintenance unlock request policies. These revisions will standardize and clarify the policies and procedures for the visit maintenance unlock requests.

- The policy has been reorganized and some sections renamed to clarify the responsibilities of each entity in the Visit Maintenance Unlock Request process.
- “PSO” (proprietary system operator) has been added to the list of entities that must follow a policy where applicable.
- The usage of the acronym “PSO” has been changed to EVV proprietary system vendor where applicable.
- The process for Visit Maintenance Unlock Requests that involve the former EVV system has been added.
- The language regarding the circumstances under which HHSC or an MCO (the payers) may approve a visit maintenance unlock request has been clarified to remove repetitious language.
- Specific language has been added stating that the payer must still approve or deny the Visit Maintenance Unlock Request within the 10 business days allowed for processing when they have requested clarification from the program provider, FMSA, CDS employer or PSO.
- The language for Visit Maintenance Unlock Request processes for payer approval of the request has been updated to reflect that proprietary system vendors may be separate entities from the PSOs.
- Policy has been added requiring the state provided EVV system vendor or EVV proprietary system vendor to import visit transactions into their system when the visit transactions were made in a former EVV system and unlock visits within the 10 business days allowed for processing.
- Policy has been added allowing the program provider, FMSA, CDS employer or PSO to request an extension to complete visit maintenance.

PSOs should note that they are a program provider or FMSA that has been approved to use an EVV proprietary system and are still required to comply with all policies applicable to program providers or FMSAs.

These revisions will be effective November 12, 2024.

Policy

9060 Visit Maintenance Unlock Request

A Visit Maintenance Unlock Request, when approved, allows a program provider, FMSA, CDS employer or PSO the opportunity to correct data element(s) on an EVV visit transaction(s) after the visit maintenance time frame has expired.

The program provider, FMSA, CDS employer or PSO may request a payer unlock EVV visit transaction(s) for visit maintenance. If the request is submitted by an FMSA on behalf of a CDS employer, the FMSA must make sure the CDS employer approves any corrections to time worked. If the request is submitted by a CDS employer, the CDS employer must notify their FMSA in writing, such as via email.

Approvals and denials of Visit Maintenance Unlock Requests are at the payer's discretion and are determined on a case-by-case basis based on EVV policy or EVV system error. If the request is submitted by the CDS employer and the payer has approved or denied the request, the payer must also notify the FMSA in writing, such as via email. If the request is sent by the FMSA on behalf of the CDS employer, the FMSA must notify the CDS employer of the approval or denial in writing, such as via email.

Payers will only approve requests to manually enter and export an EVV visit after the visit maintenance time frame if:

- The program provider, FMSA, CDS employer or PSO was unable to manually enter and export an EVV visit during the visit maintenance time frame because of a state provided EVV system error or EVV proprietary system error and the error was not resolved within the visit maintenance time frame.
- HHSC determines an exception is required for circumstances such as a payer error or natural disaster.

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When submitting a Visit Maintenance Unlock Request to create a manual visit because of a payer or EVV system error, the program provider, FMSA, CDS employer or PSO must provide evidence that demonstrates:

- They informed the payer of the error within the visit maintenance time frame.
- The error was not resolved during the visit maintenance time frame.
- They made a good faith effort to comply with the visit maintenance time frame.

Correcting EVV visit transactions during a LTC FFS contract monitoring review or after it has occurred will not change any type of contract action such as recoupment or settlement reviews taken as result of the LTC FFS contract monitoring review.

Program Provider, FMSA, CDS Employer or PSO Submission of Visit Maintenance Unlock Request

Program providers, FMSAs, CDS employers and PSOs must complete the Visit Maintenance Unlock Request form specific to their payer and service delivery option on their payer's website.

The program provider, FMSA or PSO can only select the following items from the Incorrect Data Element column of their Visit Maintenance Unlock Request to be unlocked for correction:

- Bill Hours
- Bill Time In
- Bill Time Out
- Contract Number
- Employee ID
- HCPCS Code/Modifier
- Member Medicaid ID
- Modifier
- NPI/API
- Payer
- Reason Code
- Service Code
- Service Group
- Units

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- Visit Location
- N/A – Create Manual Visit
- N/A – Export Only

The CDS employer can only select the following items from the Incorrect Data Element column of their Visit Maintenance Unlock Request to be unlocked for correction:

- Bill Hours
- Bill Time In
- Bill Time Out
- Employee ID
- HCPCS Code/ Modifier
- Member Medicaid ID
- Modifiers
- Payer
- Reason Code
- Service Code
- Service Group
- Units
- Visit Location
- N/A – Create Manual Visit
- N/A – Export Only

If the visit transactions were recorded in a former EVV system and must be imported into the current EVV system, the program provider, FMSA, CDS employer or PSO must indicate this on the Visit Maintenance Unlock Request form. They must ensure visit transactions recorded in a former EVV system are in an “Accepted” status in the EVV Portal before including them in the request. CDS employers should work with their FMSA to ensure the visit transactions are in an “Accepted” status.

Emails with a completed Visit Maintenance Unlock Request must be sent securely and include a contact name, email address and phone number. Payers will deny Visit Maintenance Unlock Requests not sent securely because of a violation of the Health Insurance Portability and Accountability Act (HIPAA). Contact the payer for help with sending a secure email request.

The payer will deny the Visit Maintenance Unlock Request if it is missing required information or cannot be opened by the payer.

There are Visit Maintenance Unlock Request Job Aids on the [HHSC EVV website](#). They have step-by-step instructions for completing the Visit Maintenance Unlock Request form and submitting the request.

The payer may request clarification of the Visit Maintenance Unlock Request. The program provider, FMSA, CDS employer or PSO must respond within 10 business days of the payer's request for clarification, otherwise the Visit Maintenance Unlock Request will be denied. The program provider, FMSA, CDS employer or PSO must resubmit the Visit Maintenance Unlock Request with the requested clarification.

Payer Processing of Visit Maintenance Request

Payers must approve, deny or request a clarification on the Visit Maintenance Unlock Requests after receiving a secure and complete request from the program provider, FMSA, CDS employer or PSO within the following time frames:

- Ten business days
- Thirty business days if the request was submitted as supporting documentation for a MCO claims appeal

If the Visit Maintenance Unlock Request is for visit transactions that were recorded in a former EVV system and must be imported from the Aggregator into the current EVV system. The payer must run the EVV Visit Maintenance report in the EVV Portal. There is an EVV Visit Maintenance Report Job Aid in the [EVV Training for MCOs](#) section of the [TMHP Learning Management System](#) that includes step-by-step instructions to run the report. This is the payer's responsibility and must be completed by the deadline for processing the Visit Maintenance Unlock Request.

Payer Request for Clarification

The payer may request clarification from the program provider, FMSA, CDS employer or PSO. The program provider, FMSA, CDS employer or PSO must provide the requested information within 10 business days of the payer's request for clarification.

Once the program provider, FMSA, CDS employer or PSO responds, the payer must approve or deny the Visit Maintenance Unlock Request within ten

business days from the date the program provider, FMSA, CDS employer or PSO responds to the request for clarification.

If the program provider, FMSA, CDS employer or PSO does not respond by the deadline, the payer will deny the Visit Maintenance Unlock Request and the program provider, FMSA, CDS employer or PSO must submit a new request.

Payer Approval of Request

If the payer approves the Visit Maintenance Unlock Request, the payer will reply to the program provider's, FMSA's, CDS employer's or PSO's unlock request within 10 business days confirming approval of the Visit Maintenance Unlock Request and copy the state provided EVV system vendor or EVV proprietary system vendor.

Only approved items on the Incorrect Data Element column of the Visit Maintenance Unlock Request will be unlocked for editing.

The state provided EVV system vendor or EVV proprietary system vendor must only allow changes to the items approved by the payer.

Payer Denial of Request

If the payer denies the request, the payer must notify the program provider, FMSA, CDS employer or PSO by email of the reason for the denial. The email notification must also include information on how to:

- Submit a new Visit Maintenance Unlock Request
- Request a claims appeal, if applicable
- Submit a formal complaint against the payer

Payers may automatically deny a Visit Maintenance Unlock Request if the request:

- Was not sent through a secure method
- Is incomplete or missing required information
- Could not be unencrypted
- Was submitted using an outdated, modified, or incorrect version of the Visit Maintenance Unlock Request form

Payer Incorrect, Incomplete or Retroactive Authorization Approvals

The payer must approve the Visit Maintenance Unlock Request when:

- The payer included incorrect or incomplete information on the prior authorization for a member and the updated authorization requires updates to EVV visit transactions outside of the EVV visit maintenance time frame.
- The payer submits a retroactive authorization for a member that will require the program provider, FMSA, CDS employer or PSO to resubmit an EVV visit transaction or EVV claim outside of the EVV visit maintenance time frame.
- HHSC directs the payer to approve the Visit Maintenance Unlock Request.

State Provided EVV System Vendor and EVV Proprietary System Vendor Visit Transaction Unlock Process

Once the state provided EVV system vendor or EVV proprietary system vendor receives the approved Visit Maintenance Unlock Request from the payer, they must validate the information submitted and unlock the visit transaction within ten business days of receipt of the approved Visit Maintenance Unlock Request.

If the Visit Maintenance Unlock Request is for visit transactions captured in a former EVV system, the state provided EVV system vendor or EVV proprietary system vendor must import the visit transactions into their system and ensure they are unlocked; then reply to the payer and the program provider, FMSA, CDS employer or PSO to indicate visit maintenance can be performed. This is included as part of the state provided EVV system vendor's or EVV proprietary system vendor's responsibilities and must be completed within the ten business days allowed for processing the Visit Maintenance Unlock Request.

If the information submitted by the program provider, FMSA, CDS employer or PSO is incorrect, invalid or missing data elements, the state provided EVV system vendor or EVV proprietary system vendor will:

- Not unlock EVV visit transaction(s) for visit maintenance.
- Return the Visit Maintenance Unlock Request to the program provider, FMSA, CDS employer or PSO.

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- Tell the payer, program provider, FMSA, CDS employer or PSO of the reason the EVV visit transaction(s) cannot be unlocked for visit maintenance.

Once the information is corrected, the program provider, FMSA, CDS employer or PSO must submit a new Visit Maintenance Unlock Request to the payer.

Program Provider, FMSA, CDS Employer or PSO Visit Maintenance

Once the visit transaction is unlocked, the program provider, FMSA, CDS employer or PSO has 20 business days to complete the visit maintenance. If necessary, the program provider, FMSA, CDS employer or PSO may request additional time to complete visit maintenance. The request for additional time must be made within 20 business days allowed for completing visit maintenance.