

## Electronic Visit Verification (EVV) Implementation Tip Sheet for Self-Direction Programs

*Self-directed services can be provided wherever people happen to be – at home, at work, and while participating in the life of the community.*

*Applied Self-Direction provides practical expertise intended to create and operate self-direction programs that run effectively and efficiently for individuals, states, managed care entities, Financial Management Services providers, and other stakeholders. Applied Self-Direction is the Technical Assistance, Training, and Membership arm of the National Resource Center for Participant-Directed Services (NRCPS). The mission of Applied Self-Direction is to promote self-direction so individuals have the choice and control to live the lives they want.*

This tip sheet, developed with experience from states and other public entities administering self-direction programs and from Financial Management Services (FMS) providers, helps states and others ensure EVV systems mitigate fraud while supporting the flexibility of self-direction. ***Individual choice and control propel the cost savings, high quality of life, and positive health outcomes experienced in self-direction.*** Design your EVV solution around your program, not the other way around.

People using self-directed services live in cities, suburbs, small towns, on farms and remote communities.

**EVV Implementation Tip:** An EVV system that supports self-direction needs to have flexibility and adaptability related to internet access and mobile devices. A successful EVV system will accommodate limited or no internet access where personal care service is delivered.

Like all of us, people using self-directed services experience last-minute changes and unexpected challenges.

**EVV Implementation Tip:** An EVV system that supports self-direction would avoid rigid scheduling rules. A successful EVV system will allow individuals to schedule their workers as they choose, including making frequent schedule changes.. Scheduling must occur only between the participant and his or her worker.

People using self-directed services are typically on the go – running errands, meeting friends, going to work, enjoying their hobbies & living full lives in the community.

**EVV Implementation Tip:** An EVV system that supports self-direction will be as mobile as the people using it. A successful EVV system will support individuals getting services wherever the individual lives his/her life -- not only in the home, near the home, or at a pre-approved set of locations.

Technology is an essential tool, but people need to know how to use the tool to realize its benefits.

**EVV Implementation Tip:** An EVV system that supports self-direction will be user friendly and intuitive to use. A successful EVV system will offer practical options for training end-users, especially the participant employers and the workers.

Self-direction means that individuals have the right to control their services and the responsibility for managing their budget. Individuals approving their workers' timesheets is a critical component of budget management.

**EVV Implementation Tip:** An EVV system that supports self-direction is designed to keep participants "in the driver's seat". A successful EVV system will provide a variety of accessible means for individuals to approve service hours, using both innovative and standard technologies.

Workers may not always be able to call-in the moment work begins or check-out the moment the work ends. Mistakes will also happen. Correcting our errors and moving forward is an everyday life experience and should not result in financial hardship.

**EVV Implementation Tip:** An EVV system that supports self-direction will make it easy to retroactively adjust shift start or end times and will not result in lengthy payment delays when mistakes happen. A successful EVV system will facilitate efficient communication for problem-solving when mistakes occur.

FMS providers have been implementing a variety of successful technology solutions for tracking worker time and verifying that services have been provided. FMS providers take their role in monitoring seriously and are valued partners in assuring accountability for Medicaid expenditures.

**EVV Implementation Tip:** An EVV system that supports self-direction will be designed for integration with existing investments in automation to avoid duplication of effort and expenditures. A successful EVV system will build on the efforts of FMS providers rather than mandating implementation of new systems if current systems meet federal requirements.

Self-directing participants can provide both an essential and unique perspective on implementing EVV in your state. Invite them to join the conversation.

**EVV Implementation Tip:** State-wide EVV implementation plans that support self-direction will be developed in concert with all of the key stakeholders – specifically with the input of individuals who self-direct their services. A successful EVV system will not only meet the federal requirements for EVV, but will also provide useful tools that facilitate operation of self-directed programs.



**EVV is not FMS. Adding payroll to EVV does not mean you have achieved FMS.**

**EVV Implementation Tip:** Self-direction is simple in concept, but complex in management of the payments, tax and labor rules. FMS are a unique set of services that has taken the FMS industry two decades to master. Beware of an EVV vendor who tells you they can “do payroll, too” and you do not need an FMS provider. FMS is much more than payroll. Don’t set up your program for major compliance and operational disasters.