

Strategies That Work: Implementing Electronic Visit Verification in Self-Direction



Today's Session

- Brief overview of new report on Financial Management Services (FMS) perspectives on EVV best practices
- State panel discussion on EVV implementation



New Report: FMS Provider Perspectives on EVV Best Practices for Self-Direction



Developed by the National Self-Direction Policy Workgroup

- What is the National Self-Direction Policy Workgroup?
 - Comprised of FMS entities committed to advancing self-direction through collective action
 - Convened by Applied Self-Direction as part of the national FMS membership offering
- The concept and approach for the new EVV report were developed under the leadership of this workgroup
 - Specifically seeks to provide guidance to states and MCOs seeking guidance on how to improve EVV implementation for self-direction



Capturing FMS Perspectives on EVV

- Distributed a survey to all FMS members in November 2022
 - Approach to EVV
 - The status of EVV implementation
 - Positive and harmful outcomes of EVV for self-direction
- Conducted a two-part focus group series with FMS on challenges and best practices for EVV implementation in December 2022 and January 2023
 - Session 1 covered EVV implementation status, EVV workload for FMS providers, improved efficiencies, data aggregators, EVV models and systems
 - Session 2 covered participant dissatisfaction, access to technology, live-in caregivers, workforce crisis, quality of self-direction, and fraud prevention



FMS Contributors to the EVV Report

- Accra
- ACES\$
- Acumen Fiscal Agent
- ARIS Solutions
- AssuranceSD
- Attendant Services
Maine
- Best Care
- CDS in Texas
- Coalition of Texans with
Disabilities
- Consumer Direct
- Consumer Directions
- Easterseals DE & MD's
Eastern Shore
- Fiscal Assistance
- The Fogarty Center
- Gateways
- Granite State
Independent Living
- GT Independence
- iLIFE
- JEVS Human Services
- Lifeworks
- Lori Knapp
- Mains'l Services Inc.
- Metro Solutions
- MRCI WorkSource
- Palco
- Partners In Community
Supports (PICS)
- Pathways
- Personal Accounting
Services (PAS)
- Premier
- Public Partnerships
- Veridian



Challenges of EVV for Self-Direction

- EVV implementation has been challenging for most FMS providers, especially in states where they must use an external vendor, submit data to an aggregator, or follow unclear or unrealistic policies and timelines from states or MCOs

| How is EVV implementation going in the state(s) you serve? | Percentage |
|--|------------|
| It's going well | 18% |
| It's challenging | 82% |



Challenges of EVV for Self-Direction

- EVV has caused participant dissatisfaction, anxiety, and confusion, especially among live-in caregivers, family members, older adults, and those with limited access to technology, internet, or language options, as well as direct care staff attrition

| From your perspective, has participant dissatisfaction with EVV improved in the last year? | Percentage |
|--|------------|
| Yes | 31% |
| No | 69% |



Benefits of EVV for Self-Direction

- Providing a convenient and secure way for workers to record their time and tasks electronically, reducing paperwork and errors.
- Enhancing the transparency and accountability of service delivery and allowing employers and FMS to monitor and verify the quality and quantity of services.
- Improving the efficiency and accuracy of payroll and billing processes, reducing administrative burden and payment delays.

“We have a lot of people that enjoy using the EVV software system and like not being tied down to a piece of paper. Budget details at fingertips. No overlapping shift issues between staff.”



Best Practices for Stakeholder Engagement

- Involve FMS entities, self-direction participants, and workers early and often in the planning, implementation, and evaluation of EVV, and ensure their representation and input is included in policy and decision-making processes.
- Establish clear and consistent communication, training, and support for EVV users on EVV requirements, expectations, and options.

“Self-direction is often not considered at the start of the state implementation. Once these decisions are made by the state and the state elected aggregator, it's often too difficult, based on the timeline for them to reconsider a different approach.”



Best Practices for EVV Policies

- Establish clear and consistent policies and guidance on EVV requirements, expectations, and timelines, and communicate them effectively and frequently to all stakeholders, using multiple channels and formats.
- Ensure all policies are established and communicated early enough to allow adequate testing time prior to implementation deadlines. Stakeholders' feedback should be requested to ensure ample time exists.

“It would be more helpful if MCO/state are more organized in the rollout and aware of the amount of time it takes to rollout. some of the timelines given are not thought through”



Best Practices for Collaboration with FMS

- Consider that the technology needs for EVV systems are different in a self-direction context versus an agency context. Common EVV system requirements such as scheduling and attestations are not aligned with the philosophy of self-direction and can cause unnecessary restrictions and burdens on the participant and their worker.

“Consumer-directed participants are very different from traditional agency workers and their differences aren't considered”



Best Practices for Partnering with Data Aggregators

- Involve FMS providers in the selection, contracting, and oversight of aggregators, and solicit their input and feedback on the performance and functionality of aggregators.
- Establish clear and timely communication channels and protocols between FMS providers and aggregators, and designate a point of contact for each party.

“If we are sending EVV data, again it's important to start early and engage with stakeholders to educate the state and state-elected aggregator on why self-direction is different than traditional provider agencies. Tech specs to send data often change and we are not notified proactively.”



Learn More

- Read the full report for practical recommendations for successful EVV implementation in self-direction:
 - [Financial Management Services Provider Perspectives on Electronic Visit Verification Best Practices for Self-Direction](#)



State Panel Discussion

