

CDV Training for  
Option 1  
Employers

# CDV Process



# What is EVV?

# What is CDV?

- **EVV** – Electronic Visit Verification is a computer-based system that electronically –verifies when service visits occur – documents the date and time service delivery begins and ends.

**ALL employees with use EVV to clock in and out.**

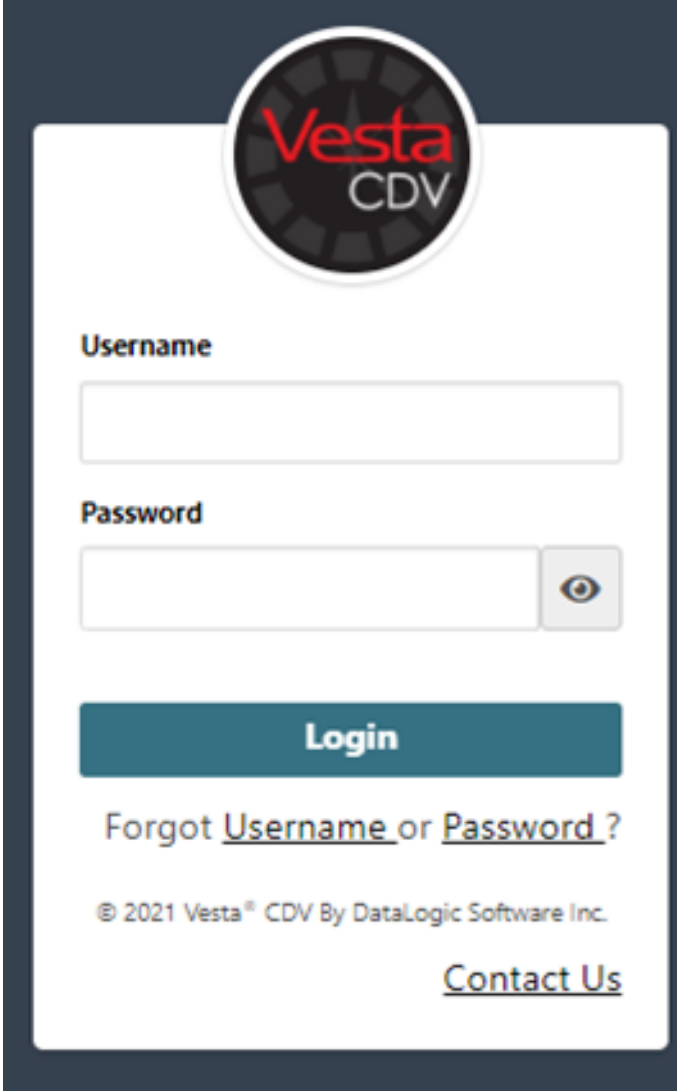
- **CDV** – Consumer Directed Verification is a free simple solution for consumer directed employers to manage, verify and electronically approve time worked for a CDS member.

**Only Option 1 Employers will use CDV to view and verify employee's time.**

# Logging Into Vesta CDV

-Employers will login to  
view their employees time  
at **cdv.vestaevv.com**.

-Login information will be  
emailed and spoken to  
you over the phone by  
EAK Good Neighbor.



The image shows a login form for Vesta CDV. At the top center is the Vesta CDV logo, which consists of a dark circle with a white grid pattern and the text "Vesta" in red and "CDV" in white below it. Below the logo are two input fields: "Username" and "Password". The "Password" field has a small eye icon to its right, indicating a toggle for password visibility. Below the input fields is a teal "Login" button. Underneath the button is a link that says "Forgot Username or Password ?". At the bottom of the form, there is a copyright notice: "© 2021 Vesta® CDV By DataLogic Software Inc." and a link that says "Contact Us".

# Home Screen

From the home screen you will see any relevant new or updates and documents with directions and explanations for different tasks in Vesta.

**Vesta CDV Menu** Home lsmitheak@6047

### Top News and Events

## Visit Maintenance Timeframe Extension

Effective July 1, 2021, the Health and Human Services Commission (HHSC) is permanently extending the 60-day visit maintenance timeframe to 95-days for all program providers, Financial Management Services Agencies (FMSAs) and Consumer Directed Services (CDS) employers.

For dates of service 7/1/2021 onward, the visit maintenance timeframe is extended from 60 days to 95 days.

Previous Visit Maintenance extensions still apply for the dates of service below:

- 1/1/2021 - 3/31/2021, timeframe was extended from 60 days to 180 days.
- 4/1/2021 - 6/30/2021, timeframe was extended from 60 days to 90 days.

For more information, view the Visit Maintenance Temporary Policy document in Publications or email questions to [EVV@hhs.texas.gov](mailto:EVV@hhs.texas.gov).

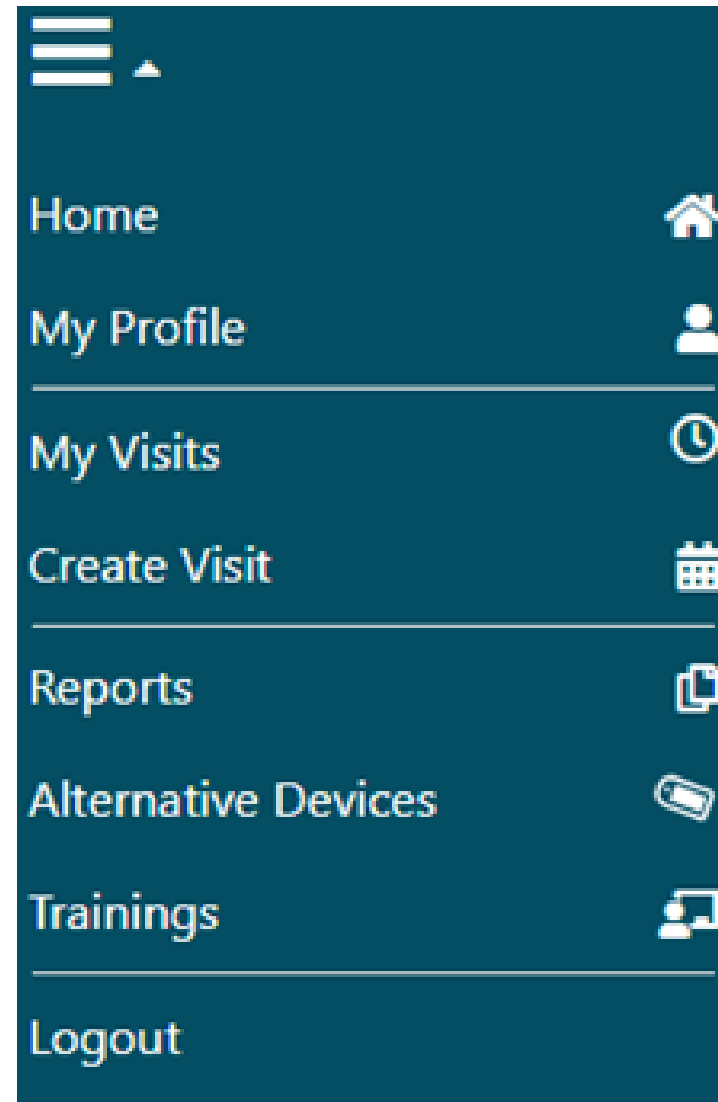
### Publications

#### Documents

- [DataLogic Vesta Scheduled Maintenance Schedule 2021](#) PDF New
- [Vesta Mobile Application Update - CDS Employer](#) PDF New
- [Vesta CDV Linking Calls When Creating Visits](#) PDF New
- [Vesta CDV Billable Hours](#) PDF New
- [Failed to Export Guidance - CDS Employer](#) PDF New
- [Total Billable Hours](#) PDF New
- [Vesta FMSA - CDS Customer Support and FAQ](#) PDF New
- [Vesta EVV Documenting Non - EVV Hours](#) PDF New
- [Q & A Invite](#) PDF New
- [Vesta Landline and Alternative Device Interactive Voice Response \(IVR\) Updates](#) PDF New

# CDV Menu

You will have the following options to choose from when you click onto the menu in the top left corner of the home screen. Everything you need to do will be done from this list.



# My Visit

From the “My Visits” screen you will be able to perform visit maintenance and approve visits. As an Option 1 employer – you will need to confirm this information is correct, perform any necessary visit maintenance and “approve” it.

The screenshot displays the 'My Visit' application interface. At the top, there are search filters: 'From' (09/15/2021), 'To' (09/22/2021), 'Select CDS Employee', 'Select CDS Member', and 'Select Payer - Program - Service'. There are 'Apply' and 'Clear' buttons. Below the filters are tabs for 'Pending Visits', 'Approved Visits', 'Inactive Visits', and 'Call View'. The main content area is titled 'Pending Visits' and includes several status indicators: 'Missing Data', 'Conflict of Hours', 'Pending FMSA Review', 'Review FMSA Changes', 'Landline', 'Vesta® Mobile', and 'Alternative Device'. A table with the following columns is shown: 'Select All', 'Visit ID', 'CDS Member', 'CDS Employee', 'Program / Service', 'Date', 'EVV Actual Time In', 'EVV Actual Time Out', 'Actual Hours', 'Actual Rounded Hours', 'Billable Hours', 'Created By', and 'Action'. The table is currently empty, displaying 'No Records Found.' At the bottom, there is a pagination control showing '10' items per page, and a summary bar indicating 'Total Billable Hours 0' and '0 - 0 of 0 items'.

# My Visits

The screenshot shows the 'My Visits' interface. At the top, there is a header with the title 'My Visits' and the user email 'Ismitheak@6047'. Below the header is a filter bar (1) with fields for 'From' (09/16/2021), 'To' (09/23/2021), 'Select CDS Employee', 'Select CDS Member', and 'Select Payer - Program - Service'. There are 'Apply' and 'Clear' buttons. Below the filter bar are tabs for 'Pending Visits', 'Approved Visits', 'Inactive Visits', and 'Call View'. The main content area is titled 'Pending Visits' and includes an 'Icon Legend' (2) with icons for 'Missing Data', 'Conflict of Hours', 'Pending FMSA Review', 'Review FMSA Changes', 'Landline', 'Vesta Mobile', and 'Alternative Device'. A table (3) displays a list of pending visits with columns: 'Select All', 'Visit ID', 'CDS Member', 'CDS Employee', 'Program / Service', 'Date', 'EVV Actual Time In', 'EVV Actual Time Out', 'Actual Hours', 'Actual Rounded Hours', 'Billable Hours', 'Created By', and 'Action' (4). The table contains one row of data for a visit on 09/22/2021.

Select All	Visit ID	CDS Member	CDS Employee	Program / Service	Date	EVV Actual Time In	EVV Actual Time Out	Actual Hours	Actual Rounded Hours	Billable Hours	Created By	Action
<input type="checkbox"/>	8843686	TRAINER II, CHARLES	MILLER, KARA	HHSC Fee For Service LTC Programs - CLASS - 104: CLASS RESPITE IN HOME	09/22/2021			0 hrs 0 mins	0.00	3.00	MILLER, KARA	

The legend below explain each component above.

1. **Filters** – The user can filter by date range, employee, CDS member, if applicable and select **Apply**.
2. **Icon Legend** – Icons identify the status of the visit and method used to clock in and clock out.
3. **Pending Visits** – When CDS Employees' clock in and clock out, visits are shown in the pending visits.
4. **Action Button** – The **Action** button is a drop-down menu to view the visit, edit the visit, change the program and service, or create a visit memo.

# Create Visit

From the “Create Visit” screen you can create visits on behalf of your employee(s). You will create visits for your employee when a disruption has caused them to miss clocking in and out. Examples of this would be poor cellular service, Vesta Mobile App not working or an employee forgetting to clock in and out. EVV is a requirement of all CDS employees so this should only be used when completely necessary.

### Create Visit

Use Create Visit to generate a visit for a future date or to create a visit when an employee did not use the EVV System to clock in and clock out.

<b>CDS Member *</b>	<b>Date of Visit *</b>
<input type="text" value="TRAINER II, CHARLES"/>	<input type="text" value="month/day/year"/>
<b>Planned Visit Start Time *</b>	<b>Planned Visit End Time *</b>
<input type="text" value="hour:minute AM"/>	<input type="text" value="hour:minute AM"/>
<b>CDS Employee *</b>	<b>Program / Services *</b>
<input type="text" value="MILLER, KARA"/>	<input type="text" value="Select Payer - Program - Service"/>

**Visit Duration**

Please enter a Planned Visit Start Time and a Planned Visit End Time to view Visit Duration.

[Create Visit](#)



# My Profile

- From the “My Profile” screen you can see the user info connected with your account. This image is an example of what you will see.

- If you want to change your password, you will come to this screen and select “Change Password”.

The screenshot displays the 'My Profile' interface. At the top, there is a dark teal header with the text 'My Profile'. Below this, the content is organized into three main sections: 'User Information', 'Provider Information', and 'CDS Members'. The 'User Information' section includes fields for Name (KARA MILLER), Username (lsmitheak@6047), Email (lsmitheakcads@gmail.com), Address (redacted), and Accessibility (Off). Below these fields are links for 'Toggle Accessibility', 'Change Password', and 'Update Profile'. The 'Provider Information' section shows Agency ID (6047) and EVV Phone Numbers (English: 877-729-9390, Spanish: 877-400-7187). The 'CDS Members' section includes a note to click on member names for details and lists one member: CHARLES TRAINER II.

**My Profile**

**User Information**

- Name: KARA MILLER
- Username: lsmitheak@6047
- Email: lsmitheakcads@gmail.com
- Phone:
- Address: , ,
- Accessibility: Off

[Toggle Accessibility](#)  
[Change Password](#)  
[Update Profile](#)

**Provider Information**

- Agency ID: 6047
- EVV Phone Numbers:
  - English: 877-729-9390
  - Spanish: 877-400-7187

**CDS Members**

To view Member details, click on the Member Name below.

- CHARLES TRAINER II

# Other Training Materials

- Additional training content can be accessed in the CDS Menu, under Trainings. Contents include guides, videos, and links for webinar trainings.
- EAK Good Neighbor has several EVV Specialists in office and can assist you in approving visits, conducting visit maintenance or troubleshooting any technical issues. We are available 8:00-12:00 and 1:00-5:00 Monday thru Friday.

903-524-2400 – [contact@eakcds.com](mailto:contact@eakcds.com)