Demonstration Checklist

The purpose of the EVV system demonstration is to ensure functionality exists and not to evaluate the system for usability.   All demonstrations will be held either virtually or in the Ohio Department of Medicaid (ODM) offices, at ODM's discretion. Those offices are located at:

50 West Town Street
Columbus, Ohio 43215

In order to satisfy the demonstration requirement, all of the following must occur:

- The vendor must attend in person or remotely and provide a live demonstration of the EVV system being used by the provider.
- The provider must participate in the demonstration in person or remotely.
- All items of this checklist must be successfully demonstrated during the live demonstration.
- Only test data should be used during the demonstration. Test data should not include any actual employee or individual information.

ODM will send the provider a letter documenting the results of the demonstration, including a copy of the completed checklist, within 3 business days by email. A copy of the letter will be sent to the vendor and Sandata.

The areas and items listed below must be successfully completed in the live demonstration. Multiple items can be shown in a single visit capture, visit edit or data entry example.

Create Employee Records(E1 through E4)

Item	Pass	Fail
E1 The alternate system requires entry of the Social Security Number for direct care workers and administrative staff.		
E2 The alternate system requires entry of an email address for all employees with administrative roles allowing them to directly enter information and or edit information.		
E3 The alternate system will not allow an email to be used by more than one employee.		
E4 The alternate system will not allow an email used by a former employee to be used by another employee in the future.		

Comments:

Create Client Records (C1 through C11)

Item		Pass	Fail
C1	The alternate system must allow the provider to associate an individual with a payer.		
C2	The alternate system must allow the provider to associate an individual with multiple payers. (N/A when only capturing DODD services)		
C3	The provider must be able to associate an individual with a program.		
C4	The provider must be able to associate an individual with multiple programs. (N/A when only capturing DODD services)		
C5	The alternate system must allow the provider to associate an individual with a service.		
C6	The alternate system must allow the provider to associate an individual with multiple services.		
C7	The alternate system must allow the provider to enter a Newborn Indicator and Client Payer ID. (N/A when only capturing DODD services)		
C8	The alternate system must allow the provider to enter a PIMS ID as a Client Payer ID when the only payer is ODA. (N/A when only capturing DODD services)		
C9	The alternate system must allow the provider to enter an Alternate Medicaid ID if an individual receives a new Medicaid ID.		
C10	The alternate system must allow the provider to enter 3 or more addresses for an individual.		
C11	The alternate system must allow the provider to enter multiple phone numbers for an individual.		

Comments:

Visit Capture (V1 through V17)

Item		Pass	Fail
V1	The primary method of capturing visit data includes the capture of GPS coordinates at the start of the visit in near real time (GPS coordinates cannot be hard coded).		
V2	The primary method of capturing visit data includes the capture of GPS coordinates at the end of the visit in near real time (GPS coordinates cannot be hard coded).		
V3	The alternate system captures the date of the visit in near real time.		
V4	The alternate system captures the start time of the visit in near real time.		
V5	The alternate system captures the identity of the individual receiving services in near real time.		
V6	The alternate system captures the identity of the person providing services in near real time.		
V7	The alternate system captures the service provided in near real time using the standard values.		
V8	The alternate system captures the end time of the visit in near real time.		
V9	The alternate system captures voice verification in near real time (unless the solution is only being offered to DODD waiver providers).		
V10	The alternate system captures a signature verification in near real time (unless the solution is only being offered to DODD waiver providers.)		
V11	The provider can enter a visit manually directly into the alternate system. The manually entered visit includes all required data elements.		
V12	The alternate system uses the standard list of reason codes to record the reason a visit is manually entered directly into the alternate system.		
V13	The alternate system collects the appropriate attestation to document that the provider is maintaining documentation supporting the visit entered manually directly into the system.		
V14	The alternate system maintains a complete audit trail when visits are entered manually into the alternate system. The audit trail shold include the date and time of the visit entry and the person entering the visit.		
V15	The alternate system offers a third method of visit capture. The third method is _____. The third method of visit capture records all required data elements.		
V16	If telephony is used as the third method of visit capture, the telephone number from which the call is made is captured in near real time.		
V17	The alternate system captures call type. (MVV, manual, _____).		

Comments:

Visit Maintenance (M1 through M21)

Item		Pass	Fail
M1	The alternate system gives the provider the opportunity to manually edit the visit after visit capture both before and after the visit is submitted to the Sandata aggregator.		
M2	The alternate system uses the standard set of reason codes to capture the reason for the manual edit.		
M3	The alternate system collects an attestation stating that the provider has documentation to support the edit to the visit data.		
M4	The alternate system maintains a complete audit trail when manual edits are made to visits. The audit trail should include the date and time of the change, the person making the change, and what the change is.		
M5	The alternate system appropriately calculates and applies the Client Signature Exception (unless the solution is only being offered to DODD waiver providers).		
M6	The alternate system appropriately calculates and applies the Missing Service Exception.		
M7	The alternate system appropriately calculates and applies the Service Verification Exception (unless the solution is only being offered to DODD waiver providers).		
M8	The alternate system appropriately calculates and applies the Unauthorized Service Exception.		
M9	The alternate system appropriately calculates applies the Unknown Client Exception		
M10	The alternate system appropriately calculates and applies the Unknown Employee Exception. (Not applicable if telephony is not an alternate method of visit capture)		
M11	The alternate system appropriately calculates and applies the Visit Verification Exception (unless the solution is only being offered to DODD waiver providers).		
M12	The alternate system appropriately calculates and applies the Visit Without In-Call Exception.		
M13	The alternate system appropriate calculates and applies the Visit Without Out-Call Exception.		
M14	The alternate system appropriately calculates and applies multiple exceptions to a single visit.		
M15	The alternate system appropriately calculates and applies exceptions to visits after the visit data is edited by the provider.		
M16	The alternate system appropriately allows the provider to acknowledge exceptions to clear them.		
M17	The alternate system uses the standard list of reason codes to document the reason the exception was created and is acknowledged.		
M18	The alternate system captures an attestation stating that the provider has documentation to support the visit.		
M19	The alternate system appropriately allows the provider to edit the visit to clear exceptions.		
M20	The alternate system maintains a complete audit trail when exceptions are cleared. The audit trail should include the date and time of the change, the person making the change, and what the change is.		

Comments: