

	Functionality	Comments
1	Information about Company	Company Background
		Area of specialty
2	Login to the system Steps needed	Begin Demo starting with access to the system
		Inform about name convention (user name, email, First/Last, Last/first)
		Inform about password requirements (number of characters, how often changed, rules for password set up and reset, password recovery options)
3	Entry or Home Screen	Where do you land once you log in (patient demographic screen, Patient dashboard screen, etc.)
		Show flexibility of customization of home screen
4	Enter New Patient Demographics	Personal Information
		Emergency Contact
		Care Manager entry
5	Enter Patient Insurance information	Insurance policy/plan
6	Authorization Entry based on level of determination for the completion of the Assessment and Individual Service Plan (ISP)	Initial authorization for assessment (level of determination) - (3 visits within 14 days) Authorization information needed for countdown (Frequency; # of service/visits, Time allowed per service, Length of authorization).
		Incorporate an alert upon accessing the patients electronic chart. Alert should indicate remaining visits/days
7	Enter services allowed to be received by the client	Assign client to a Program/Service
8	Enter Assessment and ISP	Assessment Individual Service Plan (ISP) = Treatment Plan (TP)
9	External document attachment to chart	Format of the attachment Sorting of the attachment (electronic file cabinet)
10	Enter/Submit Claim	Service Entry Claim Batch Claim submission/transmission Claim reports
11	Authorization Entry for MCO approved Services	Services approved for 50 hours lasting 15 minutes to be provided within 4 weeks
12	Create Progress Note	HCBS Specific Service Templates: Progress Note

13	<b>Show changes on authorization Count down #1</b>	Compare Authorization information before/after claim submission
14	<b>Create Discharge Note</b>	HCBS Specific Service Templates: Discharge Plan
15	<b>Show End of Day report What are the sorting options?</b>	Detail or Summary of Services (Charges) Detail or Summary of Payments Detail or Summary of Adjustments
16	<b>Show how users can identify Mandatory Fields</b>	Indicate which fields must be entered or the system will not let you proceed
17	<b>Show how User Roles are assigned to Direct Service Staff</b>	Accessibility
18	<b>Show Auto-Save features</b>	Manual and Auto recovery options
19	<b>Show how End of Day backup is performed</b>	End of Day backup
20	<b>Show how Customer Support operates</b>	How customers request support and Customers support response time

		VENDOR 1	VENDOR 2	VENDOR 3	VENDOR 4
Weight	Key functionalities to grade				
16%	Visualization				
13%	Has functionalities based on the organizations needs				
13%	Start up cost for base product				
12%	Easy to Navigate (Minimun Clicks and Keystrokes)				
11%	Easy to Use (Automated features)				
11%	Customer Support				
7%	Available Templates and Reports				
5%	Training				
4%	Software upgrades				
2%	Network Upgrades				
2%	Clearinghouse cost				
2%	Vendor stability				
1%	Signature Pad				
1%	Vendor NY Footprint				

100%

Score

OVERALL RANKING (1-10)