

# **Tool for In-Home and CDS Providers**

## ***Questions to Ask Potential Telephony Vendors***

**Prepared by Members of the MO Alliance for Home Care (MAHC)  
CDS and State Programs Task Force**



### **Telephony system**

1. What are your upfront costs?
2. Ongoing costs? (Maintenance, support, phone lines?)
3. Do I need to purchase software, hardware, server?
4. Can your product be customized?
5. Is the provider charged per call?
6. Is there a cost to call from the participant's telephone? (DHSS requirement)
7. Does the system record the exact date services are delivered? (State statute)
8. Does the system record the exact clock-in and clock out times? (State statute)
9. Can the attendant add tasks completed during the shift worked?
10. Does the system verify the telephone number from where the services were completed? (State statute)
11. Does the system verify that the number from which the call is placed is a telephone number unique to the client? (State statute)
12. What will prevent an attendant from calling-in without being at the individual's home? (or servicing the participant at the time?)
13. Would a participant receiving services be able to have a split schedule?
14. Can I use the telephony system at multiple office locations?
15. Work schedules vary day by day. Is this supported by your system?
16. What are some of the quality assurance reports that can be run?
17. Is the system capable of producing reports of services delivered, tasks performed, client identity, beginning and ending times of service, and date of services? (State statute)
18. What happens if an employer (participant) does not have a landline?
19. What products can be utilized if the client does not have a phone?
20. What happens when there is a "miss-punch"?
21. How many licenses does the software come with? How much does it cost to purchase extra licenses?
22. Can I check or access data remotely?
23. Security assurances?
24. Can you walk me through a typical clock-in and clock-out?
25. What happens when your system goes down?

26. Who completes database maintenance?
27. Does the system accommodate rotary phones and touch tone telephone instruments? (DHSS requirement)
28. Will the system allow for all attendants to have a unique personal identification number? (State statute)
29. Does the system alert me or the attendant when all the units on the care plan have been utilized for the month?
30. How can I be sure the attendant is the one clocking in (voice recording or voice verification or GPS?)
31. If we were to change telephony providers in the future, could we take the data with us?
32. Is this a “packaged” product with other components, like scheduling or clinical, or is it sold a la carte?

### **Billing/Payroll**

1. Will providers have the opportunity to review call and visit information before the billing and payroll exports are generated?
2. Will the software collaborate with other billing /payroll systems?
3. Is there a cost to integrate my existing billing and payroll systems or software with the telephony or electronic visit verification (EVV) product?

### **Training and Support**

1. What is your training process?
2. Will you send representatives/IT for in-house training?
3. What are the typical hurdles for implementing a telephony system?
4. How are you going to support me and help me be successful with telephony?
5. Does IT support cost extra?
6. How long will it take to transition to telephony?
7. Is there support or assistance for archiving, if necessary?

### **Consumer-Directed Services (CDS)**

1. Is voice verification / voice recording for participants available?
2. Can an employer (participant) verify time worked by their employee (attendant)? (State statute)
3. If a regulatory authority asks us to provide all of the time records, including any voice recordings, for a particular participant for a significant length of time, what sort of mechanism is in place to do this? Does each recording need to be saved individually or is there a simpler way to do this?

### **System Requirements**

1. Where is the information stored-on the client server or in the cloud?
2. What minimum IT requirements/storage are needed to run the system?
3. Is your system browser/cloud based or software hosted on our computers?

4. Will the system work on a Mac?
5. How do I obtain system updates? Typically, how often are system updates run?
6. Do we need extra phone lines?
7. Will your company add additional phone lines to the system in order for our caregivers not to receive busy signals when trying to clock in and clock out? How do you monitor if this is needed?
8. How many numbers or phone lines need to be set up?

### **Integration**

1. What is your integration/upload process?
2. What are the typical hurdles during integration?
3. Can we talk directly to IT to help with integration?

### **Company Info**

1. Tell me how your company upgrades to meet the evolving needs of your customers.
2. What differentiates your company from other telephony vendors?
3. Does your company receive HIPAA training and are you HIPAA compliant?
4. Will you sign and adhere to a Business Associate's Agreement to agree to comply with HIPAA in your business dealings with us?

(Statute 660, section 660.023 for In-Home Services)  
(Statute 208, sections 208.909 and 208.918 for CDS)