Sandbox scenarios

1. What Icon would you find the:

   a. Review Id - Home Screen

   b. Visit Date – Provider Profile

   c. List of associated people for that provider – ID Key

   d. Upload – Upload or Home

2. You went on a site visit, and the door was locked. What do you do next?

   a. You should call the business to inquire about their business hours and days they are there. Where do you find their phone number? Provider profile icon, under the provider's address.

   b. You will need to come back another day, where do you log the second visit date? Provider Profile screen using the Add another visit date

   c. Where would you put the necessary notes? On the access question, indicate no, a box opens, select unmet for door locked. In the note box, indicate if this was your first or second attempt, date, and time.

3. Practice using the orange Manage Role Type Place Information filter

   a. Add a staff person (remember to mark New/Undisclosed Person NUP when they are new data) and select multiple roles. Indicate this person is the Interviewee Int.

   b. Find current staff on the left and add a new role for them (remember to mark Data Changed since information is changing)

   c. What do pink highlights indicate? The individual is not saved. Click on their name on the left, save on the bottom of the right-hand side of the screen.

4. Practice using the green filter Open Role Type Place Quick Filter

   a. Locate the staff you just entered in the above step and select them using the green filter

   b. Switch to another staff by selecting their name (Clue: click on the green filter again)

   c. Get back to the main checklist Click on the green filter and select Clear Filter

5. Look for a question that is not locked and set a flag

   a. If a pop-up box opens when you set the flag, shut that off by going to the gear/widget in the top right, select preferences, then click on the box Do not show a pop-up when clicking a flag

6. The first question under the section Business Questions is locked. There is an owner present to interview.

   a. How do you enter a response? You have to unlock the first two questions using the orange and green filters.

   b. How do you indicate this is the interviewee? Click on the orange filter, find the owner's name in the list (if it's not listed, add a new staff). In the roles, click on Interviewee Int, click save at the bottom right of the filter.

   c. How do you respond if they say their name is Chris (Bob, Sue, Bill, Terry, etc.)? Is that your legal name?

7. You used the green filter, selected the staff you are interviewing, and no questions are showing (or only one question is showing). What step did you miss? You must use the orange filter, select the owner's name, and click on Interviewee Int. Go back into the green filter and the two questions should appear.

8. The first question under the section Business Questions is locked. You spoke with a receptionist that indicated no owner, managing employee, or authorized agent was present.

   a. How would you indicate that on the checklist? On the access question, indicate no, a box opens, select unmet for Owner, managing employee, authorized agent not present. In the note box, indicate if this was your first or second attempt, date, and time.

   b. What is the next step before you leave the property? Check with your supervisor.

9. In the Physical Location section, answer the question "Location accessible to the public" with this scenario. The building is open, you enter the lobby, however, the next door is locked (Do not worry about access with this scenario). Unmet, put in the notes the second entry is locked, and flag this item.

10. Wait, you went into the wrong building in the previous scenario, and you can get in without restriction. Change your answer from the previous question from unmet to met. Is there anything else to change? Unflag it and delete your note.

11. Practice uploading your checklist, write down your Review Id, and remove it from your device. Home screen, using the far-right drop-down button (review actions), select remove from your device.

12. Using the review id from above, bring that checklist back to the home screen. Select Add an existing review from this device in the bottom left. Enter the review id in the top search button and hit enter.

13. You are done with ELICI, how do you properly log out? Use the cog/widget in the top right corner and select logout.

14. You are visiting a provider type 38. Use your PT reference sheet to process this section of the checklist.

1 of 5	Licensed/Supervising/Qualified Professional	➕	➖	①	🚩
-	Verification of licensed/unlicensed professional employees	☐	☐	☐	🚩
-	Professionals employed at this location	☐	☐	☐	🚩
-	Verification of provider type (PT) roles	☐	☐	☐	🚩
-	Professional leads	☐	☐	☐	🚩
-	EI-EIDBI ONLY W-4 or W-9	☐	☐	⊘	🚩

Q1. Compare what is in the ID Key Icon (that is the list that comes from our database) with the list they offer you. Do they match? This question compares what is in our database. No need to enter names with this question.

Q2. During your conversation and using the response from above, if the information matches (nothing new presented) check yes. However, if they provide additional names, mark no, and follow instructions. If they can't provide the names, mark no and follow instructions.

Q3. We want to know if they have a person that fills the roles. Since this is provider type 38, the PT sheet tells me we expect a designated biller and supervising professional/manager. Ask do you have staff that fill each of these roles? Check yes, if they do, and check no if they do not, (flag, ask why, and note).

Q4. We want specific details on just one lead person in each role from above. Who is your designated biller? Who is your supervising professional/manager? Collect the details for them as noted in the instructions. If you find they have a lead for one position but not the other, check no and follow instructions.