

# 10 QUESTIONS TO ASK ANY IDD SOFTWARE VENDOR BEFORE SIGNING A CONTRACT

A vendor's demo is designed to impress. Your evaluation should be designed to find the gaps. These are the questions experienced IDD administrators wish they'd asked before signing, the ones that separate platforms that will genuinely work for your agency from ones that will require constant workarounds. Ask every vendor. Compare answers directly.

1

**"Show me how a service visit becomes a submitted claim, every step, without staff intervention."**

Don't accept a description. Ask for a live walkthrough. Every step that requires manual data transfer between modules is staff hours lost every billing cycle.

2

**"How does case management connect to billing and service delivery?"**

ISP goals, service notes, authorizations, and billing records should be connected, not parallel documentation that staff maintain separately.

3

**"Does your platform handle vocational programs, piece-rate tracking, and client payroll?"**

If your agency operates any vocational component, verify this capability specifically. Most platforms don't have it.

4

**"How do scheduling and workforce management connect to payroll?"**

Ask what happens when a DSP works an unscheduled shift. The answer tells you whether payroll close still involves reconciling multiple data sources manually.

5

**"Who maintains state-specific billing and compliance rules, you or us?"**

Don't accept a description. Ask for a live walkthrough. Every step that requires manual data transfer between modules is staff hours lost every billing cycle.

**"What does your implementation process look like for an agency our size?"**

A vendor who can describe their process specifically, by role, by timeline, by go-live support, is in a different category from one who answers with "it depends."

6

**"Can we talk to three agencies similar to ours that implemented in the last 18 months?"**

Ask for agencies similar in size, service types, and state, not the vendor's best-case reference customers. Ask them what implementation was actually like.

7

**"How does your platform handle financial management and reporting?"**

Program-level revenue and cost, funding source performance, grant reporting, this should be part of the platform, not a disconnected finance tool.

8

**"What does your product roadmap look like for the next 12-18 months?"**

Vendors with a clear, IDD-focused roadmap are invested in the sector. Vague answers may mean IDD is one vertical among many, not a core market.

9

**"What is the total cost of ownership, not just the license fee?"**

Add implementation, training, support, integrations, and the cost of your current manual processes. The total cost comparison looks very different from the license fee.

10

The quality and specificity of a vendor's answers tells you as much as the software itself. A platform that handles your most complex billing scenario, your state's rules, your vocational programs, and your payroll close, without manual workarounds, is the one worth signing. Ready to put these questions to Vertex? Schedule a demo at [vertexsystems.com](https://vertexsystems.com)