

# Responsibilities of Primary Care First (PCF) Practice Sites for the Patient Experience of Care (PEC) Survey

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## Learn about the PCF PEC Survey

The [PCF PEC Survey web portal](#) is the official website and main resource for both practices and vendors to find all information about the PCF PEC Survey. Practices should be sure to review:

1. [The PEC Survey Fact Sheet](#). This includes information about the PEC Survey schedule and survey instrument, practice responsibilities and PEC Survey administration, PEC Survey scoring and results reports, and PEC Survey webinars and resource materials.
2. [PCF PEC Survey Participation Overview for Practices](#). Under the Practice Sites Tab, practices will find a detailed description of what it means for a practice to participate in the PCF PEC Survey.
3. [Frequently Asked Questions for Practices](#). Under the General Information Tab, practices will find a list of commonly asked questions about the PCF PEC Survey related to participation, survey administration, sampling, and survey measures and reporting.
4. **Quick Links for Practices**. On the right side of the [PCF PEC Survey home page](#) there are links to various resources with step-by-step instructions for how to use the website.
5. [Survey and Protocols Tab](#). All patient-facing survey materials used by vendors, including the questionnaire, telephone scripts, letters, postcards, posters, and FAQs are posted here. These materials are also posted on [PCF Connect](#) in the Connect Library.
  - a. [Vendor Quality Assurance Guidelines \(QAG\)](#). For a full understanding of the protocols and guidelines followed by the survey vendors in implementing the PCF PEC Survey, please review this vendor manual, which is posted on the Survey and Protocols Tab. All survey vendors are trained to follow these standardized survey protocols. This manual also includes a section on Practice Site Responsibilities in Chapter 3.
6. [The on-demand Introduction to the PCF PEC Survey Webinar](#). This webinar is accessible via YouTube and includes a discussion of the role of the PEC Survey in PCF and explanation of why patient experience is important. It also covers how the PEC Survey data is collected and how the data can help improve patient experience and drive model improvements.



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## Authorize a survey vendor to conduct the survey

Practices can find the current list of approved PCF vendors on the [PCF PEC Survey web portal](#) and on [PCF Connect](#). Please note, this is not the final list of approved vendors for 2024. **The final list of approved vendors will be available in May 2024.** Practices will receive an updated list that includes conditionally approved vendors in March and a final list of fully approved PCF survey vendors in May. The vendor authorization window for the PY 2024 PEC Survey is March 11 – June 14, 2024.

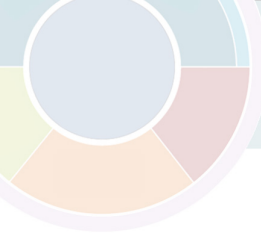
**If your practice will continue to use the same survey vendor that was used to administer the PY 2023 PEC Survey, you do not need to update the online vendor authorization form.** However, you must update the online vendor authorization form if either of the following apply:

- Your practice is participating in the PCF PEC Survey for the first time in PY 2024; or
- Your practice is switching to a different survey vendor to administer the PY 2024 PCF PEC Survey (see “Switching Vendors” section below).

Practices and vendors will enter into a formal written contract and practices will attest to the execution of a Business Associate Agreement (BAA) during the vendor authorization process. Authorizing a vendor on the PCF PEC Survey website should be done **after** the contract for services with that vendor is in place.

Authorizing a vendor is an easy three-step process for practices:

1. **Register on the [PCF PEC Survey web portal](#).** A designated staff member serving as the PCF PEC Survey Administrator will register on the website and obtain a username and password. Please see these handy Quick Links with step-by-step instructions on [registering as a practice site user](#) and registering a practice site.
2. **Sign a contract with a vendor to conduct the PCF PEC Survey.** Practice sites should review the **final list of approved vendors** on the [PCF PEC Survey web portal](#). **The final list of fully approved vendors is updated annually each May.** CMS has adopted standardized survey protocols that allow for varying survey costs and ensured that the approved vendors are trained to implement these protocols consistently. However, CMS does not dictate the pricing for the approved survey vendors. Practices are encouraged to contact vendors for cost and service information as there may be differences among vendors.
3. **Authorize a vendor.** Once a contract has been signed with a vendor, the staff member who registered in Step 1 will authorize that vendor on the [PCF PEC Survey web portal](#). This is done by completing the survey vendor authorization tool under the Practice Sites tab on the [PCF PEC Survey web portal](#). Practice sites select their survey vendor from a drop-down list and the start date when they authorize that vendor to conduct the survey and submit data on their behalf. As part of the vendor authorization process, each practice site must attest to the existence of a BAA with their survey vendor on the [PCF PEC Survey web portal](#). CMS will not select and provide a patient sample for the



practice site unless the vendor authorization form with BAA attestation is completed. Please see this handy [Quick Link](#) for step-by-step instructions.

**Withdrawals, terminations, splits, and mergers.** If a practice site withdraws from PCF, is terminated from PCF, splits and forms two or more PCF practice sites, or merges two or more practice sites during the year, they should contact PCF Support for guidance regarding the timing of the PEC Survey requirements and the Quality Gateway. Depending on the timing of the change, the practice(s) may or may not be required to submit a patient roster, authorize a vendor, and/or complete data collection. Practice sites should follow standard PCF protocol for notifying PCF Support of mergers, splits or withdrawals by emailing [pcf@telligen.com](mailto:pcf@telligen.com). Note: CMS and their contractor RTI cannot be involved in business arrangements between vendors and practices. It is the responsibility of the practice to notify the vendor of any change in status or contract.

**Switching vendors.** If a practice site decides to switch vendors, they may do so during the open authorization period (March-June) each year. To switch vendors, the practice should edit their Survey Vendor Authorization on the [PCF PECS web portal](#) by selecting the new vendor's name and the survey year this new vendor is authorized to collect and submit data for the practice site. Changes will not be accepted after the deadline has passed and sampling has begun. Practices are also responsible for contacting both vendors and signing a new contract and BAA with their new vendor. Updating the online vendor authorization form simply informs CMS of the change.

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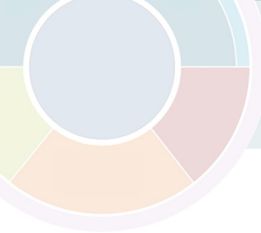
## Submit an all-patient roster

All PCF practices are required to submit an all-patient roster via the [PCF Portal](#) in **early summer (mid-May through the end of June)**. Practices should not submit their roster to their survey vendor or on the PCF PEC Survey web portal. Roster instructions, templates, and [an on-demand webinar](#) are made available to practices and Health IT/Electronic Health Record vendors in the spring. Please note that to ensure the timeliness of information and maximize response rates, we ask that you create your patient roster as close as possible to the time of submission, and not earlier than May 1<sup>st</sup> of each year. Practices receive communication about these materials and deadlines via First Edition and Connect.

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## Notify PEC Survey vendor of residential care/assisted living facilities

Practice sites must provide to their authorized survey vendor the names and addresses of residential care facilities and assisted living facilities where five or more of your patients in their practice site reside. To identify facilities, the practice site may scan through their patient's addresses or may do a search online for nearby residential care/assisted living facilities.



For patients from these facilities selected to participate in the PEC Survey, please note the following:

- A [special envelope](#) will be used to ensure the survey reaches the intended recipient or proxy (family member or friend who can complete the survey on behalf of the patient).
- These patients will not receive telephone calls about the survey due to the burden this causes facility staff.

Your PEC Survey vendor will be in touch to request this information. Communicating the names and addresses of these facilities to your vendors is an important step in supporting successful PEC Survey data collection!

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## Confirm practice name and address with PEC Survey vendor

Prior to printing the mail survey in September, your PEC Survey vendor will be in touch to confirm that the practice name and address on file from the PCF roster are accurate and will be familiar to patients. This information is printed on the survey cover letter and survey cover and is used by telephone interviewers. Lack of familiarity with a practice name or mailing address can lead to lower response rates. Please assist your PEC Survey vendor with this important task.

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## Increase patient participation in the PEC Survey

- Data collection for the Primary Care First (PCF) Patient Experience of Care (PEC) Survey begins in September and runs through December. Every year, CMS evaluates ways to improve patient engagement. By using the resources provided below and taking a few important steps, your practice can increase your patients' awareness of the PCF PEC Survey and subsequently increase participation.
- **Send a message to patients in September** to let your patients know the PEC Survey will be coming and you would appreciate their participation. Please use the language provided by CMS, available in the [PCF PEC Survey Messaging to Patients](#). Practices may send this message via patient portal or by other channels of communication, such as mail or video. **Display the PEC Survey poster at your practice.** Your practice must display at least one PCF PEC Survey poster in a highly visible area of your practice. The poster lists important PEC Survey information in 12 languages and has space to include your vendor's contact information. [Small](#) and [large](#) versions of the poster are available on PCF Connect. (The small version can also be used as a handout.)
- **Distribute the PEC Survey FAQs.** Print and distribute the [PEC Survey FAQs](#), available in both English and Spanish on PCF Connect. Space is available to include your vendor's contact information.
- **Answer patient questions and express support for the survey.** Your practice staff should be aware of the PCF PEC Survey so they can confidently reassure patients the



survey is legitimate and confidential. If a patient talks to practice staff about the survey, practice staff should answer questions according to the response given in the Waiting Room FAQs and assure patients of confidentiality. See below for additional guidelines.

<b>Do</b>	<b>Do <u>Not</u></b>
<b>Express support for the survey</b>	Ask patients if they would like to be included in the survey
<b>Answer questions based on the Waiting Room FAQs</b>	Attempt to influence patients' answers on the survey
<b>Confirm the legitimacy of the survey and the survey vendor</b>	Attempt to determine which patients were sampled
<b>Confirm that participation is voluntary</b>	Solicit positive feedback from patients in the survey
<b>Assure patients that the practice has no way of knowing who responds to the survey. Patient names are never reported, only responses.</b>	Translate the survey into the patient's language. (A translation provided by the patient's family member or friend is appropriate.)
<b>Confirm that their participation will not affect the care they receive</b>	Offer incentives of any kind for participating in the survey
<b>Confirm that their participation will not affect their Medicare benefits or other healthcare benefits</b>	Provide a copy of the questionnaire or survey materials to patients

Please see Section 3.4.4 of the [Vendor Quality Assurance Guidelines](#) for a more complete list of Dos and Don'ts.

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## Review the Data Submission Summary Report

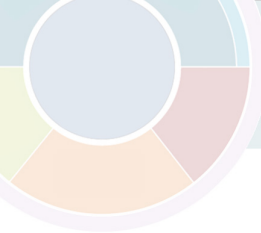
Vendors will submit data in **January** after data collection is completed. Practice sites should review the Data Submission Report under the Practice Sites tab<sup>1</sup> on the [PCF PEC Survey web portal](#) to confirm that their survey vendor has submitted data on time and without data problems. As a reminder, per the PCF Participation Agreement, "If the vendor does not timely submit the PCF Practice's PEC Survey results, or if the vendor submits inaccurate, unusable, or otherwise compromised data, CMS will assign the PCF Practice a 0 for its yearly PEC Survey score, and the PCF Practice will not meet the Quality Gateway for that Performance Year, pursuant to Section 5.03(b)(1), and CMS may take remedial action against the PCF Practice pursuant to Article 15."

To confirm submission by your vendor:

- Log in to the [PCF PEC Survey website](#)
- Choose **Data Submission Report** from the **Practice Sites** tab

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<sup>1</sup> Users must be logged in to view this report

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- Click **Show Report** (if you have multiple practice sites, you can choose to review each site individually using the dropdown)
  - Verify the data your vendor submitted has a validation status of “passed”
  - Contact your survey vendor if your practice is not listed

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## Understand and Use the PEC Survey Results

Practices receive two reports from CMS:

1. Summary results for the PCF PEC Survey are available in the Quality Gateway Report, scheduled to be released in Q3 of each year. The Quality Gateway Report also includes results for eCQM and CQM performance.
2. Detailed results are available in the PCF PEC Survey Supplemental reports, which are released in Q2 for the previous performance year. Each performance year, CMS prepares personalized, easy to understand score reports for each practice site. The PCF PEC Survey Supplemental reports include your practice’s scores on each individual question, organized by the five domains, as well as the average scores in your region and across PCF. Practices should use these detailed results to understand areas in which they are doing well and areas in which there are opportunities for improvement.

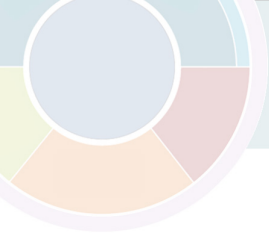
The [Understanding and Using your PEC Survey Results](#) webinar will guide you step-by-step through your official CMS PEC Survey supplemental report. Practices should also refer to the [PCF PEC Survey Reports and Scoring Fact Sheet](#). Note that survey vendors may also provide additional reports to their practice clients. However, vendor results are not official CMS results and are for a practice’s internal quality improvement purposes only. CMS-calculated results are considered as the official survey results. Survey vendors will not have sufficient information to replicate CMS scoring. Practices interested in understanding survey requirements vs. optional “bells and whistles” can ask the vendor, or see the [Vendor Quality Assurance Guidelines](#) on the PCF PEC Survey website.

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## Administer the PCF PEC Survey in conjunction with other surveys

To avoid imposing on patients, CMS strongly encourages practice sites to refrain from conducting other patient surveys or census surveys from **4 weeks prior to and during the period when the PCF PEC Survey is actively surveying**. CMS-sponsored surveys such as the CAHPS® Survey for Accountable Care Organizations Participating in Medicare Initiatives are exempt from this guidance.

- When conducting other surveys, practice sites must not ask any additional survey questions that are the same as or similar to those included in the PCF PEC Survey questionnaire. (This guidance does not apply to other CMS-sponsored surveys.)

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- Other surveys can include questions that ask for more in-depth information as long as the questions are different from those included in the PCF PEC Survey.

*Additional details on all these practice responsibilities can be found in the [Vendor Quality Assurance Guidelines](#) on the [PCF PEC Survey web portal](#).*

*Questions? Contact **PCF Support** at [PCF@telligen.com](mailto:PCF@telligen.com) or 888-517-7753*