



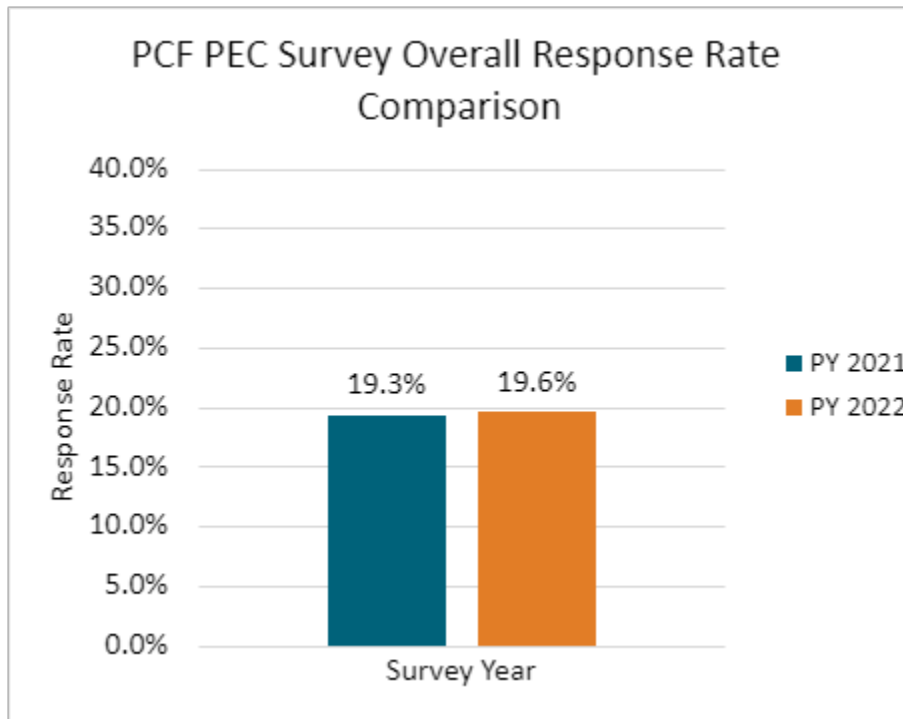
July  
2023

## PCF PEC Survey Semiannual Newsletter

### Message from the PCF PEC Survey Team

Welcome to the July 2023 issue of the Primary Care First (PCF) Patient Experience of Care (PEC) Survey Newsletter! These newsletters are posted on the PCF PEC Survey website under the General Information Tab. Please visit the PCF PEC Survey website for more information on the items mentioned in this newsletter: <https://pcfpecs.org/>

### Response Rate Trends on the PCF PEC Survey



The overall response rate remained steady over the first and second performance years (PYs) of the PCF PEC Survey, even with the addition of over 2,000 practices and over one million sample members in the second year. There were over 250,000 complete and partially completed surveys collected in PY 2022.

The response rate goal for PCF is 35.5%, and individual vendors achieved response rates as high as 33.33% in PY 2022. With a group of all experienced returning vendors in PY 2023, CMS expects vendors to apply lessons learned to obtain improved results. Vendors should monitor practice

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response rates during data collection and troubleshoot any practices with unusually low response rates.

**New for this year**, surveys will be mailed using the Department of Health and Human Services (HHS) letterhead and return address. A common complaint from practices is that patients assume the survey is junk mail. Changing to the HHS letterhead should increase the likelihood that patients will open the survey and improve response rates.

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## REMINDER: PCF PEC SURVEY Reports Were Released to Practices June 9

The PY 2022 PCF PEC Survey reports were released to practices in the PCF Practice Portal on June 9, 2023. CMS was pleased to provide practices with these important data two months earlier this year. All Cohort 1 and Cohort 2 practices that participated in the PCF PEC Survey received these reports detailing practice performance. In addition to overall PEC survey summary and domain-level scores for PY 2022, the report presents the practice's performance on each individual item in the PY 2022 PCF PEC survey and the average scores within their region and across all PCF practices.

CMS also provided practices with the following resources to assist in understanding their report:

- [“Understanding and Using Your PEC Survey Results”](#) is an on-demand webinar that provides an overview and discussion of every section of the report and describes how a practice may implement changes based on their results.
- [PCF PEC Survey Reports and Scoring Fact Sheet](#).

Survey vendors should be prepared to address questions that practice clients have about their survey results, response rates, and vendor-provided reports. They may have questions about how their PCF PEC Survey report results differ from results provided in a vendor report. Please remind them that vendor results are not official CMS results and are for a practice's internal quality improvement purposes only. Survey vendors will not have sufficient information to replicate CMS scoring.

Please direct practices with questions about their official PCF PEC Survey report, their scores, and payment to PCF Support via email at [PCF@Telligen.com](mailto:PCF@Telligen.com) or by phone at 1-888-517-7753.

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## Engaging PCF Practices

Keeping practices informed and engaged in the PCF PEC Survey data collection is critical to survey success. When practices are knowledgeable and supportive of the survey, patients are more likely to participate. Although CMS communicates information via PCF First Edition and PCF Connect, survey vendors should also communicate directly with their clients. For example:

### Upcoming Events and Milestones

9/4—RTI Closed for Labor Day

9/11–9/14—Sample files posted to PCF PEC Survey website for vendors

9/25—Teaser postcard mailing

9/25—Virtual site visits begin

9/26 —Vendor Help Desks open

10/2—First questionnaire mailing

10/9—Reminder/Thank You postcard mailing

10/23—First interim data submission due from vendors

10/30—Second questionnaire mailing

11/20—CATI non-response follow-up begins

11/20—PCF PEC Survey Team begins remote telephone interviewing

11/28—Second interim data submission due from vendors

12/8—Documentation of interviewer training, including HIPAA training, due from vendors

12/17—All mail and telephone data collection ends, Vendor Help Desk closes

1/16/2024—Final data submission due from vendors

1/31/2024—Interviewer monitoring documentation due from vendors

- ✓ Encourage practices to display the PCF PEC Survey [poster](#) and [waiting room FAQs](#). Provide your Help Desk telephone number and email address so that they can personalize the posters.
- ✓ Remind practices to send a message about the survey via their patient portal in September [using CMS-provided language](#).
- ✓ Direct practices to Dos and Don'ts section called **Communicate with Patients about the Survey in Accordance with CMS Specifications** in the [Practice Site Responsibilities quick link](#).
- ✓ Inform practices about important data collection milestones like the start of mailing and telephone outreach.
- ✓ Tell practices about the change to HHS letterhead (and why it matters). Practices should be aware of what the survey envelope and survey look like so they can vouch for its legitimacy if asked.

Vendors that provide practices with survey reports (including interim or dashboard reports) must adhere to all [Quality Assurance Guidelines](#) (QAG) requirements as detailed in Section 8.4.

## Prepare For Your PY 2023 Site Visit

Remote site visits will begin on September 25<sup>th</sup> and continue through the fall. In previous years, some PCF PEC Survey vendors have elected to create presentations to prepare for their site. The PCF PEC Survey Team highly recommends this and will provide a list of agenda items for the site visit to function as guidelines for the presentation. Survey vendors should submit their presentation to the PCF PEC Survey Team via email ([pcfpecs@rti.org](mailto:pcfpecs@rti.org)) at least five business days in advance of the scheduled site visit.

The PCF PEC Survey Team uses BlueJeans video conferencing software to conduct virtual site visits. Please ensure that your organization is prepared to use BlueJeans software before the scheduled site visit. Please review [QAG](#) Section 10.6 for more information about site visits. We look forward to speaking with your team this fall.

## Lessons Learned from PY 2022: Managing Subcontractors

As PCF has grown, many vendors have added subcontractor staff to support PCF PEC Survey administration. Per Section 3.3.6 of the

[QAG](#), approved survey vendors “must administer the PCF PEC Survey in accordance with the protocols specified in Chapters 4-9 of this manual and oversee the quality of the work performed by staff and subcontractors, if applicable.” This includes tasks such as the following:

- Performing all required quality control checks on work performed by a subcontractor. For example,
  - Checking a minimum of 10% of all printed materials.
  - Silently monitoring a minimum of 10% of all interviewer-conducted calls.

### FAQs for vendors and practices

Please visit this page to view the list of FAQs for vendors and practices:

<https://pcfpecs.org/General-Information/FAQs>

This list will be updated periodically.

### We want to hear from you!

What would you like to see in these newsletters and on the PCF PEC Survey website? What types of resources would be beneficial to survey vendors and your client practice sites?

Please reach out to the PCF PEC Survey Team at [pcfpecs@rti.org](mailto:pcfpecs@rti.org) with ideas!

### Resources For Vendors

[Quality Assurance Guidelines](#)

[Data Submission Resources](#)

[PCF PEC Newsletters](#)

[2023 Vendor Training Materials](#)

### Quick Links for Vendors


[How to Download Sample Files](#)

[How to Use the Online Validation Tool for Data Submission Files](#)

[How to Upload Interim Data](#)

[How to Add or Update Vendor Point of Contact Information](#)


- Reviewing all work products provided by a subcontractor prior to submission to the PCF PEC Survey team. For example,
  - Reviewing telephone monitoring documentation.

Please review the protocols and requirements in the [QAG](#)  thoroughly and ensure that all vendor and subcontractor staff are familiar with them and with your PCF Quality Assurance Plan (QAP) before the start of data collection. As a reminder, subcontractors used in a substantial role are expected to participate in site visits in the fall.

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## Important Steps that Vendors Must Take for A Successful Data Collection This Fall

All vendors must do the following:

- **Ask practice sites for their name and physical address.** Vendors should ask clients for the practice site's name and address that sample patients will recognize and use them on all patient materials. The PCF PEC Survey team provided the practice dba name and mailing address on the sample files exactly as they were entered into the PCF Practice Portal by the practice. It is possible the patient-recognizable name and address differ from the name and address on the sample file if the practice site elected to use a legal or other name in the PCF model. Performing this check with practices is also an excellent way to identify any typographical errors. A common reason for nonresponse to the survey is lack of recognition of the practice name and address. Completing this step can help boost response rates!
- **Employ address standardization and forwarding address techniques.** Vendors must verify each mailing address in the sample file by using a commercial address update and standardization service. When a new/forwarding address for a patient is known, the survey vendor should take advantage of that and send the mailing to the forwarding address.
- **Communicate with practices to properly address patients who live in residential care facilities.** Practices must share the names and addresses of residential care facilities and assisted living facilities where their patients reside with their PEC Survey vendor. To identify facilities, they may scan their patients' addresses or search online for nearby residential care and assisted living facilities. These patients will receive their survey in a [special envelope](#)  designed to catch the attention of facility staff and solicit proxy respondents. These patients also do not receive telephone follow-up because of the burden this causes facility staff.
- **Attempt to obtain telephone numbers for the subset of patients in the sample file for which a phone number was not provided.** Survey vendors should use a secondary source, such as phone matching services or software, directory assistance, and other phone directory applications. Vendors should take steps to ensure the telephone numbers provided by the service are associated with the patient in the sample file.
- **Take measures to ensure calls are not flagged as spam.** Survey vendors must conduct tests prior to survey launch to determine whether PEC Survey calls are likely to be flagged as spam. If they are, the survey vendor must implement measure(s) to prevent this flagging, such as

### Resources For Practices

[PCF PEC Survey Fact Sheet for Practices](#) 

[Introduction to PCF PEC Survey On-Demand Webinar](#) 

[PCF Connect](#) 

### Quick Links for Practices

[Practice Site Responsibilities](#) 

### PCF Support

Please direct your practices to **PCF Support** ([PCF@Telligen.com](mailto:PCF@Telligen.com) or 1-888-517-7753) when they have questions about the PCF model, patient rosters, PEC Survey reports, payment, and technical assistance inquiries for the PCF PEC Survey website, such as authorizing their vendor.

distributing the calls across different numbers of origination and not re-using numbers.

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## Preparing for Sample File Download in September

Sample files for the PY 2023 PCF PEC Survey will be available Monday, September 11, 2023, for download on the PCF PEC Survey website by survey vendors that have been authorized by one or more PCF practices to collect and submit survey data on their behalf.

The PCF PEC Survey website has a [Downloading Sample Files Quick Link](#) to walk vendors through the download process.

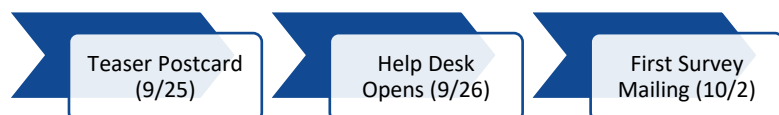
The sample patient variables contained in each sample file are listed in the [example sample file](#) that is posted to the PCF PEC Survey website.

PCF PEC Survey vendors must review their [Survey Vendor Authorization Report](#) regularly and confirm they have current Business Associate Agreements (BAAs) with all listed practices. CMS will not release a practice site's sample to their survey vendor unless the practice has fully authorized a vendor on the PECS website, including checking the BAA attestation box. CMS is unable to provide a sample to vendors without a properly executed BAA in place.

Sections 4.5 and 4.6 of the [QAG](#) contain more information about sample file protocols for the PCF PEC Survey. Please be on the look-out for further communications from the PCF PEC Survey Team about sample file downloads in the coming weeks.

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## Data Collection Begins on September 25



Please see the full survey administration schedule on the [PCF PEC Survey website](#) or in [Exhibit 5-1 of the QAG](#). Some important reminders:

- **Data collection activities must begin on the date listed.** If a vendor has a large amount of sample that cannot all be mailed in one day, mailing may continue, but it must begin on the date specified in the schedule.
- **Only approved survey material templates can be used** for printing and mailing. No changes can be made without approval from the PCF PEC Survey Team.
- **Vendors may be required to submit print proofs** prior to mailing out the teaser postcard. Impacted vendors will be informed of this requirement when their PY 2023 templates are approved.

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## First Interim Data Submission Deadline is October 23

The deadline for PCF PEC Survey vendors to submit their first interim data file to the PCF PEC Survey website is Monday, October 23, 2023. Please see this [Quick Link](#) with instructions on uploading the interim data file. [Data submission resources](#) are available on the PCF PEC Survey website.

Common issues found in PY 2022 included the following:

- Cases with a completion date but no patient data.
  - Give surveys that have not been completed a completion date of “88888888.”
- Incorrect use of completion criteria.
  - Refer to [QAG](#) Section 6.3.1 for definitions of complete and partially complete surveys.
- Incorrect use of “190 – Did not receive care at practice.”
  - Only use if a patient responds “No” to Q1 or “0” to Q3.
- Incorrect use of “270 – Pending” until all contact attempts are made.
  - Use “210 – Incomplete” only in final data submission.
- Incorrect entry of survey language when no patient data are present.
  - Mark language as “X” when there are no patient data.

Vendors should refer to feedback received from the PCF PEC Survey Team in PY 2022 when making updates to their systems and processes for PY 2023.

For additional information about data file preparation and data submission requirements, please see Chapter 7 of the [QAG](#).

**Do you have any questions?**

Email us at [pcfpecs@rti.org](mailto:pcfpecs@rti.org) or call 1-833-997-2715

Visit the PCF PEC Survey website at <https://pcfpecs.org>

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