



### Introduction

Medicaid clients receiving Consumer Directed Attendant Support Services (CDASS) in Colorado were surveyed by mail regarding their satisfaction with the services provided by their Financial Management Services (FMS) provider. This report<sup>1</sup> is specific to the FMS provider Palco, but summarized survey results for Palco and PPL are included on page one for comparison. This survey was conducted by Consumer Direct Care Network Colorado (CDCN) under contractual obligation with the Colorado Department of Health Care Policy & Financing (HCPF).

### Methodology

CDASS members were asked through mail survey to rate services provided by their FMS provider. Questions focused on FMS provider responsibilities toward customer service, web-based systems functionality and accessibility, and employer and payroll functions. Survey questions were approved by HCPF prior to mailing. The back page of the survey allowed for open-ended comments.

CDCN mailed surveys on March 28, 2021 using member mailing lists provided by both Palco and PPL. Survey recipients were asked to return completed surveys by April 30, 2021 using an included postage-paid envelope. Data entry and analysis of returned surveys was conducted by CDCN Quality Improvement department staff. Comments were data entered as close to the hand written text as possible, but with names and contact information removed or redacted.

Satisfaction questions were formatted as a numeric five point Likert rating scale, with 5 being best or most satisfied, and 1 being worst or least satisfied. Satisfaction ratings for each question are expressed as a common arithmetic average. An overall satisfaction rating - the weighted average for all questions is also presented.

### Satisfaction Ratings Summary all FMSs

	Palco	PPL	All
<b>Number of surveys mailed</b>	641	3212	3853
<b>Number of surveys returned<sup>2</sup></b>	114	427	541
<b>Return Rate</b>	17.8%	13.3%	14.0%
<b>% of Answers with highest rating value of 5</b>	60.0%	56.2%	57.0%
<b>My overall satisfaction with my FMS can be described as (average rating, question 7)</b>	<b>4.14</b>	<b>4.27</b>	<b>4.24</b>
<b>Overall weighted average (questions 3-7)</b>	<b>4.24</b>	<b>4.23</b>	<b>4.24</b>

<sup>1</sup>This report is intended for review by HCPF only, and is not for public distribution unless authorized by HCPF. Returned surveys and data analysis spreadsheet file are available to HCPF upon request.

<sup>2</sup>Surveys received after April 30, 2021 not included in the survey analysis. FMS affiliation based on self-identification of FMS provider in question one. Surveys with no FMS identified in question one are excluded from this report.



Page 1 of the survey (for reference)



2021 Annual Member Satisfaction Survey

As a managing employer in the CDASS program, please rate the services provided to you by the Financial Management Services (FMS) vendor you were affiliated with throughout the majority of 2020. Please Note: As of April 1, 2021, Acumen Fiscal Agent will have exited as an FMS vendor. Due to this, the Department of Health Care Policy & Financing has determined that a different approach to surveying member satisfaction with Acumen's services is needed. A separate survey will be provided at a later date. If you have been affiliated with Acumen for the entire 2020 year, then you may complete the survey for your current vendor.

Please rate your experiences, using a 5 to 1 scale, with 5 being best (Excellent/Most Satisfied) and 1 being worst (Very Poor/Least Satisfied). Use N/A if the question does not apply. A place for comments has been provided on the back of the survey. Please complete the survey below and return it in the envelope provided by April 30, 2021.

For best results, please use BLACK ink. Fill circles in like this: ● Not like this: ○

1. Which FMS Provider are you rating with your responses? (Please select only one)

Palco ○ PPL ○

2. If you were affiliated with Acumen Fiscal Agent for the entire 2020 year, please mark "Yes" and complete the date you transferred to your current FMS vendor.

Yes ○ / / (mm/dd/yyyy)

3. Please rate trainings and/or resources provided by your FMS at enrollment.

Table with 7 columns: Always (5), Sometimes (3), Never (1), N/A. Rows include enrollment materials, training, contact info, and enrollment process.

4. Please rate the assistance provided by your FMS to the questions you have about online resources.

Table with 6 columns: Excellent (5), Average (3), Very Poor (1), N/A. Rows include website and app timesheet submission.

5. When contacting your FMS with a question or concern, staff members...

Table with 6 columns: Always (5), Sometimes (3), Never (1), N/A. Rows include respectful, answer phone, return call, and clearly answer.

This survey is administered by Consumer Direct Care Network Colorado. If you have questions about this survey, please call us at 1-844-381-4433 for assistance.





Page 2 of the survey (for reference)



2021 Annual Member Satisfaction Survey

6. Please rate these services provided by your FMS.

	Excellent 5	4	Average 3	2	Very Poor 1	N/A
Assistance completing FMS enrollment paperwork. _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Timeliness in processing FMS enrollment paperwork. _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Paying your Attendants - on time. _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Paying your Attendants - accurately. _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Providing accurate and timely tax documentation. _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

7. My overall satisfaction with my FMS can be described as:

	Very Satisfied 5	4	Neither Satisfied Nor Dissatisfied 3	2	Very Dissatisfied 1	N/A
	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please use this space for any additional feedback about your experience working with your FMS. Please note that your comments will not be read immediately by your FMS vendor. If you need immediate assistance please contact your FMS customer service center directly.

Name (Optional\*) - please print:

Who completed this survey? Member  Authorized Representative

\*Do not write your name if you'd prefer that your comments remain anonymous.

If you have additional comments or suggestions, please submit them on another piece of paper with this survey.

Thank you for completing this survey.  
Your responses will help improve the CDASS Program!  
Please return in the enclosed envelope by **April 30, 2021**





### Satisfaction Ratings

2. If you were affiliated with Acumen Fiscal Agent for the entire 2020 year, please mark "Yes" and complete the date you transferred to your current FMS vendor.											Yes											
											#	%										
											37	32.5%										
<b>3. Please rate trainings and/or resources provided by your FMS at enrollment.</b>  Enrollment materials are easy to read/understand. Training I received about how my attendant/s track and submit their work hours was helpful. I know how to contact my FMS if I have questions. The enrollment process for myself and my attendant/s was easy to complete.	Number (#) and Percent (%) of Answers by Rating Value																					
	1 Never		2		3 Sometimes		4		5 Always		N*	Avg										
	#	%	#	%	#	%	#	%	#	%	N	Avg										
	0	0.0%	5	4.5%	21	18.9%	31	27.9%	54	48.6%	111	4.21										
	3	2.9%	8	7.6%	15	14.3%	24	22.9%	55	52.4%	105	4.14										
	0	0.0%	9	8.0%	4	3.6%	15	13.4%	84	75.0%	112	4.55										
<b>4. Please rate the assistance provided by your FMS with questions you have about online resources.</b>  Using my FMS' website. Online or mobile app timesheet submission.	Number (#) and Percent (%) of Answers by Rating Value																					
	1 Very Poor		2		3 Average		4		5 Excellent		N	Avg										
	#	%	#	%	#	%	#	%	#	%	N	Avg										
	8	7.8%	5	4.9%	22	21.4%	21	20.4%	47	45.6%	103	3.91										
8	7.6%	12	11.4%	12	11.4%	23	21.9%	50	47.6%	105	3.90											
<b>5. When contacting your FMS with a question or concern, staff members...</b>  Are respectful? Answer the phone? Return your call or email within one (1) business day? Clearly answer your question or concern?	Number (#) and Percent (%) of Answers by Rating Value																					
	1 Never		2		3 Sometimes		4		5 Always		N	Avg										
	#	%	#	%	#	%	#	%	#	%	N	Avg										
	0	0.0%	4	3.5%	5	4.4%	19	16.8%	85	75.2%	113	4.64										
	5	4.6%	2	1.9%	10	9.3%	16	14.8%	75	69.4%	108	4.43										
8	7.7%	8	7.7%	11	10.6%	13	12.5%	64	61.5%	104	4.13											
1	0.9%	11	9.8%	16	14.3%	15	13.4%	69	61.6%	112	4.25											
<b>6. Please rate these services provided by your FMS.</b>  Assistance completing FMS enrollment paperwork. Timeliness in processing FMS enrollment paperwork. Paying your Attendants – on time. Paying your Attendants – accurately. Providing accurate and timely tax documentation.	Number (#) and Percent (%) of Answers by Rating Value																					
	1 Very Poor		2		3 Average		4		5 Excellent		N	Avg										
	#	%	#	%	#	%	#	%	#	%	N	Avg										
	5	4.5%	6	5.5%	11	10.0%	21	19.1%	67	60.9%	110	4.26										
	6	5.6%	5	4.6%	15	13.9%	19	17.6%	63	58.3%	108	4.19										
	4	3.9%	4	3.9%	7	6.9%	16	15.7%	71	69.6%	102	4.43										
3	3.0%	4	4.0%	8	7.9%	15	14.9%	71	70.3%	101	4.46											
7	7.7%	7	7.7%	9	9.9%	12	13.2%	56	61.5%	91	4.13											
<b>7. My overall satisfaction with my FMS can be described as:</b>	Number (#) and Percent (%) of Answers by Rating Value																					
	1 Very Dissatisfied		2		3 Neither Satisfied nor Dissatisfied		4		5 Very Satisfied		N	Avg										
	#	%	#	%	#	%	#	%	#	%	N	Avg										
5	4.5%	9	8.1%	11	9.9%	26	23.4%	60	54.1%	111	4.14											
<b>Totals</b>											66	3.9%	111	6.5%	191	11.2%	316	18.5%	1025	60.0%	1709	4.24

\* N = total number of responses for the question.



### Comment Analysis

Fifty three (53) of 114 surveys received contained written comments. Topics within comments were classified into common themes or categories. A summary of applied Thematic Coding is presented below<sup>1</sup>.

Category/Theme	Number of Mentions	% of Total Categories
Authorization/Budgeting	2	1.8%
Authorized Representative	2	1.8%
Caregiver Hiring	4	3.6%
Caregiver Pay	18	16.1%
Caregiver Time Submittal	10	8.9%
Case Manager	4	3.6%
Communication (Dissatisfied)	13	11.6%
Communication (Satisfied)	3	2.7%
Covid	3	2.7%
Difficulty with Paperwork	1	0.9%
Enrollment Process	2	1.8%
EVV	4	3.6%
FMS Staff Interaction	8	7.1%
Just Started with this FMS	8	7.1%
Satisfied with Services	15	13.4%
Switched/Changed FMS	4	3.6%
Training	3	2.7%
Unknown	1	0.9%
Website/Software	7	6.3%
<b>Sum<sup>2</sup></b>	<b>112</b>	

<sup>1</sup>An Excel spreadsheet documenting application of thematic codes is being supplied to HCPF as a separate resource.

<sup>2</sup>Individual comments that covered multiple topics were classified into multiple categories; sum of “Mentions” exceeds total surveys with comments.



### Written Comments

<p>Palco was very good throughout the year except when tax info was sent out. Still not sure when she will get her Federal tax check.</p>
<p>Jason has been very helpfull.</p>
<p>#6 Last 3 items no payments made yet</p>
<p>I expected the communication to be great, due to a previous client enrollment. The enrollment process for the attendants was somewhat slower than expected but getting a start date for the client's care was changed several times due to the initial caseworker &amp; FMS management [REDACTED] unwillingness to communicate with myself for the client. I left several messages via customer service reps after my phone messages (to [REDACTED]) were no longer allow to his direct line. I received no return calls or explanation regarding the lack of communication.</p>
<p>Palco sent a letter that said the income is not taxable but isn't that earned income.</p>
<p>I haven't got my covid shot yet. I cant stand in line all day or set in a car what is your thoughts on that.</p>
<p>We just started with Palco. Very pleased.</p>
<p>I couldn't ans #6 last questions because 1st payroll was submitted and still under Palco review—don't know the status yet.</p>
<p>Overall, very satisfied.</p>
<p>It would be nice if a person got more help if you didn't send your time in Right. And notified not just left that way until payday. Thank you, [REDACTED]</p>
<p>Customer service rep. in Colorado not easily asses by phone – for those of us who do not do email – should have a secondary back up if not available to speak with</p>
<p>I am glad with Palco's service</p>
<p>Initial training was long, but thorough</p>
<p>Passwords were cumbersome, and difficult for 2nd attendant.</p>
<p>Initial paperwork was lost on live in employee.</p>
<p>There was confusion early 2021 on payments overbilled by acumen.</p>
<p>Palco is not working on my mobile, and phone call did not resolve it.</p>
<p>Our current timesheet has not been processed, submitted 10 days ago.</p>
<p>But this is a service for which we are grateful.</p>
<p>It is very nice experience for me to have Palco as our fms. The web site for time entry is easy. When we call for help they are prompt and accurate. I am very satisfied with Palco. Thank you!</p>
<p>I do think it would be helpful if the agency did have a local Representative in the State they are providing services as required under the Law – Currently this is not being Done</p>
<p>And Even with Covid and The many changes we <u>ALL</u> Have Experienced this should Be and Needs Follow-up on. Each state has Different Tax Rules and Laws that Do Differ—this needs to Be Looked at.</p>
<p>I have never been able to do my payroll on my Adroid devices. Thankfully, I bought a used Apple tablet at my son's urging and it's the only way I can access the payroll and time sheets. I don't know why my Samsung tablet doesn't work well with this one area. I did all of my training on my Samsung tablet and my one caregiver can clock in and out on her Samsung phone. I've loved this program as much as my caregivers do! It took awhile to get used to the flexibility we have now – After many years of being locked into a schedule for so long.</p>



### Written Comments

<p>We just started with Palco and we haven't received any payment as of yet due April 8th we used paper time sheets since we don't have computers and aren't very tech savvy. 03/05/2021</p>
<p>Not enough time to answer these question. Nobody has got paid from Palco yet.</p>
<p>I never talk to a real person at Palco Just got computer emails made the transfer more difficult.</p>
<p>We just started the program and just waiting for my employees first payment to check accuracy of their time.</p>
<p>I am still not understanding why The change of A.R has not been changed. [redacted] old the [illegible] on all paperwork and yet this change remains [illegible] in effect. You can please do this, since it was [illegible] supposed to be done 4 months ago?</p> <p>Thats all that is in need of adjustment. Please respond asap with word on when this change will happen I wish to be a attendant and [redacted] is the [illegible] A.R. Please also send documents at how can attendants is paid and the rate of pay in each category.</p> <p>Thanks [illegible] [illegible]</p>
<ol style="list-style-type: none"><li>1. There seems to be a glitch in the computer software. I have brought it to Palco's attention at least 4 times but nothing changes.</li><li>2. One of my attendant's taxes was not done correctly. Today is 4-6-21 and it's not fixed yet.</li></ol>
<p>Phone calls are not returned. Wish there was easier way to communicate via email.</p>
<p>We just switched to Palco so I don't have much experience. My provider just got paid for the first time today and it all seemed to go well. So far so good. One comment is That the Resource Coordinator didn't know who to contact so better communication with The Community Centered Board Resource Coordinators would probably be good. I didn't know who she should contact either. It might be nice to have a "person" to connect with rather than just a generic email.</p>
<p>After Numerous phone calls for pay period 1-15 March 2021. The Palco Rep promise to call me never received a call. I finally got a hold of the Rep who had the caregiver short herself 2 hours in order to process the timesheet with the promise the caregiver would get her 2 hours the next pay period which did not happen. I was very disappointed for the first time.</p>
<p>As we have only had one pay period to rate Palco, this survey is subjective at best. [redacted] with the Colorado region is doing a very good job getting us settled with the new system.</p>
<p>Palco in Colorado is wonderful - especially [redacted] and [redacted] I've had to correspond with both of these people numerous times and they are very prompt, knowledgeable, respectful</p>
<p>Having prepared payroll for various employers and teaching a class in payroll at Red Rocks Community college, I am fully capable of preparing payroll and filing tax reports for my employees with the help of an FMS. I especially do not like the complications with EVV.</p>
<p>Paper work was confusing at signup. But excellent help when I called in. Running smooth and [redacted] is doing good.</p>
<p>I am slowly getting used to Palco but I significantly preferred Acumen and was very satisfied with them and I am sad they no longer do the CDASS program.</p>
<p>Palco has been wonderful to work with. As well as my case manager. <u>Very Satisfied</u>.</p>



### Written Comments

<p>██████████ is Awesome to deal with. Always on top of everything!!!</p>
<p>The folks at Palco are always friendly and they assist us fully when we have issues or concerns. ██████████ is exceptionally courteous and has helped us get through some tight spots. Exceptional knowledge and eagerness to help out.</p> <p>Thank you</p> <p>████████████████████</p>
<p>My disability prevents me from using the computer and I am EVV exempt. Palco did not provide client or attendant ID numbers to me or my attendants even after I left a voicemail requesting them (never received a return call). My attendants resorted to submitting paper timesheets with the ID sections blank. Palco rejected the timesheets and provided the ID numbers in the rejection email so we finally have them. Hopefully things go more smoothly - but I wish Palco would have mailed me anything I need to know as I don't have email.</p>
<p>The initial on-line set-up was a bit confusing and the worker had trouble logging in on her cell phone. We did go 'round in a few circles. Everything is running smoothly now.</p>
<p>It has been Awesome working and understanding the website and Approve/submit is easy. Awesome work.</p>
<p>Thank you for help me</p> <p>Make me better.</p>
<p>On question 6 - I am completing this survey before my attendant's checks from 3-16-21 to 3-31-21.</p> <p>Please note: I had originally answered the questions about a week ago. As you can see by the boxes with an X, I changed my answer. There were problems getting both my employees accurate information that I have changed my opinion of PALCO.</p> <p>I will state again when calling, the employees attempted to help and were courteous.</p>
<p>Absolutely no complaints!</p>
<p>I've been really sick about 3 wks now. I Don't have access to computer or the internet. I'm unable to understand the internet for paperwork. I've had no contact from Palco except Internet, which I'm <u>Not</u> smart enough to figure out. I've had <u>No</u> way to pay my caregiver. So my mom, has been helping me.</p> <p>I'm not sure what my next step is to continue this program. I <u>need</u> paperwork. Not Internet. My case worker ██████████ has been great.</p> <p>Did not receive until 4-11-21</p> <p>I understand, I've been sick, 3 wks+ my case worker ██████████, has been Great w/me. I'm unable to use website I need help. I'm confused. Need paper work, not internet.</p> <p>Please help Me.</p> <p>I need this program!</p> <p>██████████</p> <p>██████████</p> <p>Tue. April 13, 2021 2:25 pm.</p> <p>████████████████████</p> <p>██████████</p> <p>No Covet. Shot</p>





Written Comments

<p>My first contact with Palco didn't occur until March 28, 2021. As of today the function transferring my employee's are not complete. In times &amp; not when new FMS company take over the employer is notified early, however if I had not initiated contact the employee would still be in "limbo." [REDACTED] has now been helping and things appear to be shaping up.</p> <p>I thought Acumen/DCI - was poorly administered - now another FMS provider has taken over and their time entry reporting is taken over by 2 entry programs.</p> <p>What is wrong with forms! April 15, 2021</p> <p>Additional comments</p> <p>The dilemma of getting my account transferred and my caregivers paid on time was incredibly stressful. I would recommend in the future that when something as critical as transferring to a new FMS, that</p> <ol style="list-style-type: none"> <li>1. CDASS and RMHS should receive a memo from the new FMS company stating that the transfer package to the employer/client was mailed on (date of mailing).</li> <li>2. CDASS and RMHS would verify that the employer/client received the paper-work package.</li> <li>3. I would suggest that when a new EVV program is presented to employer/clients and the employees <ol style="list-style-type: none"> <li>a. That a practice module be made available to the program participants. The You Tube videos are nice but a hands on approach gives the participant confidence when entering data.</li> </ol> </li> </ol>
<ul style="list-style-type: none"> <li>• Called multiple times about W2 questions. Was not given helpful info. Was promised call back, multiple occasions never was called back.</li> <li>• [REDACTED] "Caregiver" has given feedback about the timesheet system/app. It is too complicated, too redundant, not user friendly. Too much work for too little hours. Why should any employee have to clock in and out two different places?</li> </ul>
<p>It takes FOREVER to get a new employee added! It used to be we would have an answer in one day now it takes 12-14+ days! Not satisfied.</p> <p>I was also told we would be able to see Budget summary! LIE! Still can't see it I have to wait for paperwork to be mailed which is like 15 months late!</p> <p>Overall you guys got to BIG to SOON! Work on getting New Hires done sooner! &amp; Being able to see Budget Summary!</p>
<p>We ♥Palco!</p>
<p>Palco and the entire team are very helpful and professional, very glad we chose Palco.</p>
<p>[REDACTED] is "super"!</p>
<p>Palco is better than acumen they did mess up my workers taxes but at least they respond.</p>
<p>Biggest concern is the EVV platform</p>
<p>My attendants struggle with EVV due to many steps</p>
<p>There have been too many times when my attendants check is not processed on time and she is told she will have to pay a fee to have it sent or wait several weeks to receive it. This is <u>not</u> acceptable!</p>
<p>Website not great!</p>
<p>Getting started was hard work and took a lot of understanding. Once the training was completed, I feel good about choosing PALCO. CDASS has a wonderful program to help me receive the care I need. I like the option of choosing my attendants. Now the paperwork is easier and routine. I can check and sign off on my attendants time sheet.</p>



### Written Comments

When it was W2 time they finally realized that my wife was exempt from taxes. But they had been taking taxes from her since she started they didn't stop until Feb. 2021.

My only complaint is That Palco still sends me the information for two clients whom I was The AR for and I keep reporting it to Paclo as well as [REDACTED] and she never returned my call. Sincerely,

[REDACTED]

[REDACTED]

Employee of [REDACTED]

So far, we are very much wishing that Acumen was still our FMS. But, Palco is also way better than PPL so far.



## Written Comments

### Feedback Regarding CDASS

- Every single employee who has ever submitted an application is listed in the employee pay list, even if they have not worked a day in their life. This means that when account reps receive an email saying a timesheet is submitted, there is no indication as to which employee submitted and which pay period current or past they have submitted it for.
- Unfortunately, Palco's online interactive presence is a disaster. What has distinguished them from PPL in the past is their customer service/prompt responses. It seems that the enrollment specialists no longer have the band width to communicate in less than 3 business days.
- Also, while most of the customer service agents are very friendly/capable, one person on staff does not comprehend even simple/straight forward questions and has refused to transfer me to the account manager when specifically asked. She will pass the buck and blame enrollment specialists or even LTC case managers rather than do a simple computer search. Her other colleagues will do this.
- If it would be helpful to create a more simple, user-friendly interFace. I can provide recommendations that would meet the needs of account reps, applicants, and CDASS account managers.
- The timeclock app lags and does not allow my employees to clock out at times. My employees are frustrated that they cannot submit their hours on the app. Hours are lost between the app and the website.
- Every applicant asks about the Device ID because there is no explanation in the online application.
- Online app does not clearly delineate Items needs to be submitted online or a checklist of items that need to be submitted.
- Budgeting feature does not provide the info necessary for the account manager to manage their budget in a timely manner
  - It lists the total number of hours, but does not break number of hours down by payrate
  - It provides clock-in times by payrate, but total number of hours rounded up or down to the nearest fraction of the hour
- There are emails notifying account representative that timecards are available to be approved but do not list the name of the employee, leaving account representative to sort through every employee.
- Budgeting feature is only updated after PALCO has issued payment. That means Account Representative get information 2 weeks it needed. there should be a pending section in real time so account representative can make adjustments to scheduling in coming periods to remain in budget
- Before, it took 3 days for processing paperwork. now trending up to 10 days to get an employee approved
- Emails/messages to enrollment specialists are not returned leaving my employees/me to guess about the state the application, whether it is complete, and when we can schedule a start date.
- Applications are routinely listed as incomplete by Palco even though payrate forms, EVV forms, 19 documentation, and direct deposit forms are submitted.

I love Palco:

Was with PPL prior and it was horrible. Palco has been wonderful.

We should be told if new FMS does different tax forms