CAHPS Home and Community-Based Services Survey Tools

2017 HCBS Conference
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Presenters

• Survey/Measure Sponsor
  o Jean Close, Centers for Medicare and Medicaid Services

• Survey/Measure Developer Team
  o Susan Raetzman, Truven Health Analytics
  o Coretta Mallery, American Institutes for Research

• State Activities
  o Kathy Bruni, Connecticut Department of Social Services
  o Wilmarie González, Pennsylvania Department of Human Services
  o Danielle Culp, Colorado Department of Health Care Policy and Financing
Agenda

• CMS Update
• Brief Overview of HCBS CAHPS Survey Tools
• State Activities
  o Connecticut
  o Pennsylvania
  o Colorado
• Q&A
• HCBS CAHPS Survey Resources
CMS Update
LTSS Spending for HCBS Increases, Prompting New Quality and Health IT Tools through TEFT

LTSS – Institutional & Home and Community Based Services (Total Medicaid $471 B)

Source: Medicaid Expenditures for Long-Term Services and Supports in FFY 2014 (Available at Medicaid.gov)
# TEFT Components by State

<table>
<thead>
<tr>
<th>State*</th>
<th>Experience of Care Survey</th>
<th>Functional Assessment Standardized Items</th>
<th>Personal Health Record</th>
<th>eLTSS Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arizona</td>
<td>✓</td>
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<tr>
<td>New Hampshire</td>
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</tbody>
</table>

*Louisiana and Minnesota field tested Experience of Care Survey in Round 1

1. **Experience of Care Survey**
   — Field test a beneficiary experience survey within multiple CB-LTSS programs for validity and reliability

2. **Functional Assessment and Standardized Items**
   — Field test a modified set of functional assessment measures for use with CB-LTSS beneficiaries

3. **Personal Health Record**
   — Demonstrate use of Personal Health Record (PHR) systems with beneficiaries of CB-LTSS

4. **eLTSS Plan**
   — Identify, evaluate and harmonize an electronic Long-Term Services and Supports (eLTSS) plan in conjunction with the Office of the National Coordinator’s Standards and Interoperability Framework
**TEFT Component Activities**

**CROSS-DISABILITY EXPERIENCE OF CARE (EoC) SURVEY**
- Field Test: 2014–2015
- Grantee implementation: 2016–2018
- CAHPS Trademark: June 2016
- NQF endorsement of 19 HCBS CAHPS Survey-derived measures: Oct 2016

**FUNCTIONAL ASSESSMENT STANDARDIZED ITEMS (FASI)**
- Field Test: 2017
- Grantee implementation: 2017–2018
- Develop draft performance measures & testing plan to prepare for NQF measures endorsement: 2017-2018

**eLTSS PLAN STANDARD**
- Participation in solution plan development and consensus activities with the Office of the National Coordinator for Health Information Technology: 2014–2015
- Phase I Pilot execution: 2015–2016
- Phase II Pilot execution: 2016–2017

**PERSONAL HEALTH RECORD (PHR)**
- Grantee implementation: 2016–2018
- 6 TEFT states chose to implement and launch PHRs
Brief Overview of HCBS CAHPS Survey Tools
Overview of the HCBS CAHPS Survey

• Cross-disability consumer experience survey for eliciting feedback from beneficiaries receiving Medicaid HCBS services and supports
  o Focus on participant experience, not satisfaction

• Allows for comparisons across programs serving different target populations
  o Individuals who are frail elderly
  o Individuals with a physical disability
  o Individuals with an intellectual or developmental disability
  o Individuals with a brain injury
  o Individuals with serious mental illness
• Unit of analysis = HCBS program or accountable entity
• Accountable entity = operating entity responsible for managing and overseeing a specific HCBS program within a given state (e.g., managed care organization [MCO])
• Focus of analysis can vary
  o Program
  o MCO
  o Case management agency
  o County
  o State
Common Services and Providers Addressed by the Survey

• Common services
  o Personal care and behavioral health care
  o Transportation
  o Home care
  o Case management
  o Employment assistance

• Common providers
  o Personal assistant and behavioral health staff
  o Medical transportation services
  o Case manager
  o Homemaker
  o Job coach
HCBS CAHPS Survey Instruments

• Core instrument
• Supplemental Employment Module
• English and Spanish versions of both
Domains Addressed by the HCBS CAHPS Survey-Derived Measures

- Staff Are Reliable And Helpful
- Staff Listen And Communicate Well
- Case Manager Is Helpful
- Choosing The Services That Matter To You
- Transportation To Medical Appointments
- Unmet Needs
- Personal Safety
- Planning Your Time And Activities
Cognitive Screening Questions for Completing the Survey

1. Does someone come into your home to help you?
   - 1 Y YES
   - 2 N NO → END SURVEY
   - 3 D DON’T KNOW → END SURVEY
   - 4 R REFUSED → END SURVEY
   - 5 U UNCLEAR RESPONSE → END SURVEY

2. How do they help you?
   [EXAMPLES OF CORRECT RESPONSES INCLUDE]
   • HELPS ME GET READY EVERY DAY
   • CLEANS MY HOME
   • WORKS WITH ME AT MY JOB
   • HELPS ME DO THINGS
   • DRIVES ME AROUND

3. What do you call them?
   [EXAMPLES OF SUFFICIENT RESPONSES INCLUDE]
   • MY WORKER
   • MY ASSISTANT
   • NAMES OF STAFF (JO, DAWN, ETC.)
4. In the last 3 months, did you get {program specific term for personal assistance} at home?

1 □ YES

2 □ NO → GO TO Q6

-1 □ DON’T KNOW → GO TO Q6

-2 □ REFUSED → GO TO Q6

-3 □ UNCLEAR RESPONSE → GO TO Q6

5. What do you call the person or people who gave you {program-specific term for personal assistance}? For example, do you call them {program-specific term for personal assistance}, staff, personal care attendants, PCAs, workers, or something else?

_____________________________________________________________________

[ADD RESPONSE WHEREVER IT SAYS “personal assistance/behavioral health staff”]
28. In the last 3 months, how often did {personal assistance/behavioral health staff} treat you with courtesy and respect? Would you say . . .

1. Never,
2. Sometimes,
3. Usually, or
4. Always?

-1. DON’T KNOW
-2. REFUSED
-3. UNCLEAR RESPONSE

ALTERNATE VERSION: In the last 3 months, did {personal assistance/behavioral health staff} treat you with courtesy and respect? Would you say . . .

1. Mostly yes or
2. Mostly no?

-1. DON’T KNOW
-2. REFUSED
-3. UNCLEAR RESPONSE
Use of Proxies

• Sponsoring entities decide on whether and which proxies to include
  o Guardians
  o Friends or family who are unpaid
  o Individuals with regular contact
• IRB suggestions and requirements
  o Consent
  o Assent
• Introductory script should account for role in survey
• While fielding survey, consider monitoring percentage of surveys that are completed by proxy
• Adjust for proxy responses in analyses
State Activities
Using the Survey for Program Quality Management

• Assess program performance
  o Point-in-time snapshot
  o Track changes over time
• Document successes
• Identify areas for program improvement
• Assess impact of program improvement initiatives and projects
• Provide information to stakeholders on program performance
  o Internal staff, providers, and managed care organizations, beneficiaries, legislators, and the general public
  o Measures align with some CMS quality requirements
CT WAIVER STRUCTURE

• 11 Medicaid waivers
  ▪ 7 Operated directly by Medicaid agency
  ▪ 3 Operated by the DD agency
  ▪ 1 operated by Mental Health Agency

• Two HCBS State Plan Options
  ▪ 1915i effective 2012
  ▪ 1915k effective 2015
PERFORMANCE MEASURES IN WAIVERS

• Inconsistent approach across waivers
• “Reinventing the wheel”
• Performance measures in Waivers varied
• Evidence collection for CMS always challenging
• Goal is a consistent approach to reward quality and facilitate reporting
WAIVER CASE MANAGEMENT STRUCTURE

- For Elder, Disabled and Brain Injury Waivers, case management is a contracted service with contractors in 5 different regions in the state
- Quality varied among these providers
- Difficult to compare one provider with another
- HCBS CAHPS Survey offers that opportunity
- Each agency had their own QA survey approved by the department
2013 CASE MANAGEMENT CONTRACT

• Added performance bonus incentives to the contracts in 2013
• Pool is divided by the number of performance standards
• Pool total available is $500,000
COMPOSITES FROM HCBS CAHPS SURVEY

• Performance Incentives based on 3 Composite scores
  ▪ Case manager is helpful
  ▪ Choosing the services that matter to you
  ▪ Personal safety and respect
BENEFITS OF HCBS CAHPS SURVEY

1. Person-centered – aligned with CT philosophy
2. Cross-disability
   ▪ Ability to compare programs
   ▪ Increased accessibility via phone mode, alternate response, proxy
3. Development aligned with CAHPS
   ▪ Reflects what is important to beneficiaries
   ▪ Rigorous review of testing methods and results
   ▪ Trademark that providers recognize
   ▪ Flexibility to add items from other surveys
4. NQF-endorsed measures available from the survey
5. Survey sponsor can determine frequency of use
6. Publicly available from CMS
PLANNING

• Extensive stakeholder input
  ▪ LTSS Rebalancing Steering Committee – cross-disability
  ▪ ABI Waiver Advisory Committee
  ▪ Brain Injury Alliance Provider Council

• Asked questions about the survey content, procedures & use

• Advised on recruitment strategies
SURVEY ADMINISTRATION

• Designed to be administered by an interviewer
  ▪ In person
  ▪ By telephone
  ▪ **Participant’s choice**

• 81 items plus demographics and interviewer questions
  ▪ 30 minute average due to skip patterns

• Tailored program and provider-specific terms are integrated directly

• Alternate Responses (for accessibility)
  ▪ Mostly Yes, Mostly No (instead of four point scale)
  ▪ Excellent, very good, good, fair, poor (instead of 1 to 10)

• Assistance & Proxy respondents allowed by CMS (not a paid provider)
# 2016-17 CT SURVEY ADMINISTRATION RESULTS

<table>
<thead>
<tr>
<th>Summary</th>
<th>PCA</th>
<th>Older Adult</th>
<th>ABI</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete</td>
<td>400</td>
<td>400</td>
<td>313</td>
</tr>
<tr>
<td>Response rate</td>
<td>70%</td>
<td>58%</td>
<td>61%</td>
</tr>
<tr>
<td>Telephone</td>
<td>98%</td>
<td>95%</td>
<td>80%</td>
</tr>
<tr>
<td>In person</td>
<td>2%</td>
<td>5%</td>
<td>20%</td>
</tr>
<tr>
<td>Alone</td>
<td>87%</td>
<td>76%</td>
<td>64%</td>
</tr>
<tr>
<td>Assisted</td>
<td>7%</td>
<td>10%</td>
<td>16%</td>
</tr>
<tr>
<td>Proxy</td>
<td>6%</td>
<td>14%</td>
<td>20%</td>
</tr>
<tr>
<td>Spanish</td>
<td>4%</td>
<td>20%</td>
<td>1%</td>
</tr>
</tbody>
</table>
ADMINISTRATION OF THE TOOL GOING FORWARD

• All staff in Community Options Waiver Unit have been trained to administer the survey
• Representative sample for each waiver
• Care management agencies are required to have a QA unit conduct surveys on 10% of the client base
• Community Options staff will do surveys as needed to achieve representative sample for each waiver operated by the Medicaid agency
• Web based program to complete surveys
• UConn Center on Aging will conduct data analysis
• Intend to publish the results annually
WAIVER OPERATING AGENCIES

• Next steps:
  ▪ Mental Health and ID/DD agencies both interested in using the survey
  ▪ Convene a group to discuss their needs
  ▪ Develop cross waiver quality improvement strategy
QUESTIONS???

Contact information:
Kathy Bruni, MPA, LCSW
CT Department of Social Services
55 Farmington Ave
Hartford, CT 06105

Kathy.a.bruni@ct.gov

860-424-5177
Pennsylvania Waiver Programs and the HCBS CAHPS Survey

Wilmarie González, Director
Bureau of Quality Assurance & Program Analytics
Office of Long Term Living
PA Department of Human Services
Current OLTL Waiver Programs

• Aging
  – Age 60+

• Attendant Care
  – Age 18-59 with a physical disability

• CommCare
  – Age 21+ with a traumatic brain injury

• Independence
  – Age 18-59 with a physical disability

• OBRA
  – Age 18-59 with a developmental disability
## Focus of Bureau

<table>
<thead>
<tr>
<th>Div. Of Program Development and Innovation works with all bureaus to:</th>
<th>Div. Of Quality Assurance works with all bureaus to:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Develop and provide <strong>data</strong> to measure quality and drive decisions</td>
<td>• Develop and implement <strong>quality evaluation and improvement system</strong> for all OLTL programs that meet federal and state requirements</td>
</tr>
<tr>
<td>• Develop <strong>benchmarks</strong> and other <strong>standards</strong></td>
<td>• Oversee <strong>QMETs</strong> in their provider monitoring function</td>
</tr>
<tr>
<td>• Extract <strong>data</strong> from IT systems and construct analytic files</td>
<td>• <strong>Ensure standardized</strong> tools, measures and reporting for <strong>provider monitoring</strong></td>
</tr>
<tr>
<td>• Conduct <strong>research</strong> and <strong>analysis</strong></td>
<td>• Analyze and report on <strong>survey data</strong></td>
</tr>
<tr>
<td>• Develop internal and public <strong>reports</strong> (dashboards, report cards, ad hoc requests)</td>
<td>• Analyze and report on <strong>trends</strong> and patterns in consumer grievances, complaints and fair hearings</td>
</tr>
<tr>
<td>• Identify and develop improvements to OLTL <strong>information systems</strong></td>
<td>• Support <strong>Prior Authorization Review Panel</strong> for MLTSS</td>
</tr>
<tr>
<td>• Convene <strong>quarterly quality review meetings</strong> with MCOs</td>
<td></td>
</tr>
</tbody>
</table>
Current Home-Grown Survey

- Annual mailing:
  - 2,000 participants from 5 Waivers
  - 19 questions
  - Anonymous
- Sample size that allowed for a 95% confidence level with a +/-5% margin of error
- Manual tabulation (labor intensive)
- Response rate:
  - 18-20% of the participants from total amount mailed
  - Overall Satisfaction high
Current Participant Monitoring Tool

- **What is the PRT?**
  - The PRT or Participant Monitoring Tool is a web-based survey administered to all OLTL Waiver participants by Waiver Service Coordinators (SCs) six months after annual waiver visit.

- **Content includes consumer satisfaction**

- **Uses of the PRT**
  - Allows the SC to start a dialogue with participants.
  - Guides SC to look for possible adjustments to the Service Plan.
  - Data surrounding CMS HCBS Final Rule requirements can be gathered if needed. Example: “Individual has access to food at any time” is in the Final Rule and also a question on PRT.
Community HealthChoices (CHC)

A Medicaid managed care program that will include physical health benefits and long-term services and supports (LTSS). The program is referred to nationally as a managed long-term services and supports (MLTSS) program.

**GOAL 1**
Enhance opportunities for community-based living.

**GOAL 2**
Strengthen coordination of LTSS and other types of health care, including all Medicare and Medicaid services for dual eligibles.

**GOAL 3**
Enhance quality and accountability.

**GOAL 4**
Advance program innovation.

**GOAL 5**
Increase efficiency and effectiveness.
CHC Population

420,618
CHC POPULATION

94%
DUAL-ELIGIBLE

16%
IN WAIVERS

20%
IN NURSING FACILITIES

12%
49,759
Duals in Waivers

64%
270,114
Healthy Duals

18%
77,610
Duals in Nursing Facilities

4%
15,821
Non-duals in Waivers

2%
7,314
Non-duals in Nursing Facilities

Community Health Choices

www.dhs.state.pa.us
Quality Key Components for CHC

- Grievances & Appeals
- Critical Incidents
- Performance Measures
- Consumer & Provider Surveys
- External Quality Review
- Performance Improvement Projects
- Value-based Payment (future)
- Independent Evaluation
- Network Standards
- Monitoring & Compliance
- Readiness Review

CHC Quality
Selection of HCBS CAHPS Survey

• Validated tool tested in FFS and MC programs
• Ability to use with diverse population
• Voice of participant on experience of care
  – Information relevant to CMS HCBS Final Rule requirements
  – Information for stakeholders about MCO performance
• Data for DHS Secretary initiative on employment
• Ability to add select questions (e.g., from home-grown survey, dental services)
• Complements CAHPS Health Plan Survey that MCOs are familiar with
HCBS CAHPS Survey Use

- Fee for service HCBS Waivers
  - Establish baseline for MLTSS transition
  - Include Supplemental Employment Module
  - Early 2018
  - All regions except Southwest (Phase 1 MLTSS)
HCBS CAHPS Survey Use (cont’d)

• MCOs in Community HealthChoices
  – Include Supplemental Employment Module
  – Late 2018: Southwest and Southeast
  – Annually starting 2019: Statewide
Visit [Community HealthChoices](http://www.dhs.pa.gov/citizens/communityhealthchoices/index.htm#.VjzG1K2FMkl)

Wilmarie González | Director
Bureau of Quality Assurance & Program Analytics
Department of Human Services | Office of Long-Term Living
555 Walnut Street, 6th Floor
Harrisburg, PA 17101
Tel. (717) 783-7716 | Fax (717) 346-7142
Website: [www.dhs.pa.gov](http://www.dhs.pa.gov)
Colorado’s Approach to Testing Survey Modality Performance “Trial and Error”
WHAT

- HCBS CAHPS survey implementation in Colorado to assess survey modality performance
- Cross-disability tool
- Multi-modality options for clients
  - Phone - OMNI
  - In-person - Vital Research
  - Online - OMNI
- Analysis and Reporting – OMNI Institute
WHO

• *Sample Frame*- divided evenly between the following waivers:
  • EBD (Elderly Blind Disabled) Waiver clients
  • SLS (Supported Living Services) waiver clients

• Goal: to complete **500** total surveys across 3 modalities
  • 100 In-person
  • 200 Online
  • 200 Telephone
TIMELINE

Survey Administration Begins

January 2017

Survey Administration Ends

May 2017

Data Analysis Complete

June 2017
Unique Implementation Features

- Online-
  - Adaptation of survey questions to online format
  - Removal of alternative response options, refused and unclear survey response categories
  - Simplification of skip patterns and display logic
  - Paper mailers to notify (not optimal)
  - Removal of service ID questions; did not use program-specific terms and respondent-specific terms for providers
- Phone- paper pre-notification only
- In-person- use of hard copy only (non-CAPI survey software)
Modality Performance Metrics- Assessment of EFFICIENCY and DATA QUALITY

- Measures of Efficiency:
  - Survey response rates
  - Cognitive screen fail rates
  - Survey duration
  - Personnel time

- Measures of data quality:
  - Representativeness of the samples obtained
  - Distribution of demographics across modalities
  - Patterns of missing data by modality
## Response Rate by Modality

<table>
<thead>
<tr>
<th>Measuring Frame</th>
<th>In-Person</th>
<th>Online</th>
<th>Phone</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sampling Frame</td>
<td>477</td>
<td>1992</td>
<td>1005</td>
<td>3474</td>
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<tr>
<td>Total Survey Responses (#)</td>
<td>133</td>
<td>117</td>
<td>276</td>
<td>526</td>
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<tr>
<td>% of Sample Responding</td>
<td>27.80%</td>
<td>5.90%</td>
<td>27.50%</td>
<td>15.10%</td>
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<tr>
<td>% of Sample with Valid Responses</td>
<td>21.20%</td>
<td>3.60%</td>
<td>19.30%</td>
<td>10.50%</td>
</tr>
</tbody>
</table>
Demographics Across Modalities

- **Race:**
  - *In-Person sample:* Greater proportion of Spanish American respondents and smaller proportion of “Other” respondents
  - *Phone sample:* Greater proportion of “Unknown” respondents
  - *Online sample:* Smaller proportion of Spanish American respondents and greater proportion of “Unknown” respondents

- **Age:**
  - *In-person sample:* Smaller proportion of 25-34 age range clients and greater proportion of 45-54 and 55-64 age range clients
  - *Phone sample:* Smaller proportion of 35-44 age range clients
  - *Online sample:* Greater proportion of 25-34 age range clients and smaller proportion of 55-64 and 65-74 age range clients
Guardianship Status Differences

- **Waiver Type:**
  - *In-Person:* Greater proportion of EBD clients and smaller proportion of SLS clients
  - *Phone:* No significant findings
  - *Online:* Greater proportion of SLS clients and smaller proportion of EBD clients

- **Guardian Status:**
  - *In-person:* No significant findings
  - *Phone:* Greater proportion of clients without guardians and smaller proportion of clients with guardians
  - *Online:* Greater proportion of clients with guardians and smaller proportion of clients without guardians
Proxy Respondent Percentages by Modality

<table>
<thead>
<tr>
<th>Proxy Respondent Percentages</th>
<th>In-Person</th>
<th>Online</th>
<th>Phone</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Answered All Questions</td>
<td>30%</td>
<td>55%</td>
<td>76%</td>
<td>59%</td>
</tr>
<tr>
<td>Answered Some Questions</td>
<td>35%</td>
<td>14%</td>
<td>12%</td>
<td>17%</td>
</tr>
<tr>
<td>Restated Questions in a Different Way</td>
<td>26%</td>
<td>27%</td>
<td>14%</td>
<td>22%</td>
</tr>
<tr>
<td>Translated Questions</td>
<td>26%</td>
<td>6%</td>
<td>0%</td>
<td>7%</td>
</tr>
<tr>
<td>Assisted Communication Devices</td>
<td>4%</td>
<td>2%</td>
<td>0%</td>
<td>2%</td>
</tr>
<tr>
<td>Other</td>
<td>4%</td>
<td>20%</td>
<td>2%</td>
<td>10%</td>
</tr>
<tr>
<td>Received Help from Someone Paid to Provide Support</td>
<td>26%</td>
<td>24%</td>
<td>27%</td>
<td>25%</td>
</tr>
</tbody>
</table>
Ease of Use Comparison by Modality

Figure 5: Client Perception of Modality Ease of Use
Preferred Modality by Online and Phone Respondents

Phone Respondents
- In-Person Modality: 10.0%
- Phone Modality: 63.8%
- Online Modality: 19.2%

Online Respondents
- In-Person Modality: 4.9%
- Phone Modality: 5.6%
- Online Modality: 81.7%
Lessons Learned

• Cognitive Screen fails and Response Rates
  • In-person and phone modalities performed better

• Lowest survey duration period
  • Online

• Fewest personnel hours (cost)
  • Online

• Representation
  • Phone and in-person (EBD waiver over-representation)
  • Online (over-representation of guardians completing survey)
  • Online performed poorer when comparing sample frame to sample obtained
### Advantages & Disadvantages of Each Modality

<table>
<thead>
<tr>
<th>Survey Type</th>
<th>In-Person</th>
<th>Phone</th>
<th>Online</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost per Survey</td>
<td>Most expensive: Interviewer training, time, travel</td>
<td>Moderately expensive: Interviewer training, time</td>
<td>Least expensive: Automated distribution &amp; collection</td>
</tr>
<tr>
<td>Response Rate</td>
<td>Highest</td>
<td>Moderate</td>
<td>Lowest</td>
</tr>
<tr>
<td>Ability to Probe</td>
<td>High: personal interaction</td>
<td>Moderate: interviewer can clarify responses</td>
<td>None: no interviewer to probe/clarify responses</td>
</tr>
<tr>
<td>Interviewer Bias</td>
<td>Increased likelihood of bias</td>
<td>Some bias</td>
<td>None: completed without interviewer</td>
</tr>
<tr>
<td>Geographic Reach</td>
<td>Local/Regional Restriction</td>
<td>Wide geographic coverage</td>
<td>Wide geographic coverage</td>
</tr>
<tr>
<td>Data Collection Timeline</td>
<td>Slowest: scheduling and conducting interviews</td>
<td>Moderate: calling and interviewing</td>
<td>Fastest: immediate delivery and respondents complete in own time</td>
</tr>
<tr>
<td>Other Considerations</td>
<td>Manual data entry Capture demeanor, emotions, &amp; behaviors</td>
<td>Decreased use of landline phones Short notice for respondents</td>
<td>Less friendly to low-literacy audiences Not accessible for those without internet</td>
</tr>
</tbody>
</table>
These findings as a whole suggest that there are **absolute strengths and weaknesses** to each modality and that utilizing a multi-modality approach is an effective way of capitalizing on the strengths identified and overcoming the barriers for each modality.
Conclusion

Thank you!

Danielle Culp
Quality Health Improvement Specialist
Health Care Policy and Financing
State of Colorado
Questions?
HCBS CAHPS Survey Resources

• CMS webpage on HCBS CAHPS Survey
  o Survey instruments in English and Spanish
  o Technical assistance documents

• HCBSCAHPS@us.ibm.com mailbox for questions

• NQF #2967 in the NQF Quality Positioning System