



## Introduction

This customer satisfaction survey was conducted by Consumer Direct for Colorado under contractual obligation with the Colorado Department of Health Care Policy & Financing (HCPF). More than 3,450 Home and Community Based waiver Medicaid clients receiving Consumer Directed Attendant Support Services (CDASS) in Colorado were surveyed regarding their satisfaction with the services provided by their Financial Management Services Agency (FMSA). This report<sup>1</sup> is specific to Morning Sun Financial Services, but summarized survey results for all three FMSAs are included on page one for comparative purposes.

## Methodology

CDASS service recipients were asked through mail survey to rate services provided by their FMSA. Survey questions were developed jointly by HCPF and Consumer Direct staff. Questions focused on key components of the FMSA’s responsibilities toward customer service, web-based systems functionality and accessibility, and employer and payroll functions. The back page of the survey allowed for open-ended comments.

Prior to survey mailing each FMSA supplied a mailing list of their current CDASS clients to Consumer Direct in an Excel spreadsheet. Using those lists, Consumer Direct mailed surveys to 3,468 CDASS clients on October 18, 2017. The name of the client’s FMSA was identified on the survey title line. Survey recipients were asked to return completed surveys by November 27, 2017 in an included postage-paid envelope. Returned surveys were data entered and results compiled by Consumer Direct Management Solutions staff in Missoula, Montana. Comments were data entered as close to the hand written text as possible, and include the respondent’s spelling, punctuation and use of abbreviations and symbols.

A numeric five point Likert rating scale was used on each survey satisfaction question, with 5 being best or most satisfied, and 1 being worst or least satisfied. A N/A or “Not Applicable” choice was provided for each question, allowing the respondent to opt out if that question did not apply to them. 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.

## Results Summary All FMSAs

Sample Size	ACES\$	Morning Sun	PPL	All
Number of surveys mailed	520	236	2712	3468
Number of surveys returned	130	62	649	841
Return rate	25.0%	26.3%	23.9%	24.3%
<b>% of Answers with highest rating value of 5</b>	79.1%	76.5%	65.4%	68.4%
<b>Overall Weighted Average</b> (all questions)	<b>4.68</b>	<b>4.65</b>	<b>4.43</b>	<b>4.49</b>
<b>My overall satisfaction with my FMS can be described as</b> (average rating, question 5)	<b>4.74</b>	<b>4.70</b>	<b>4.45</b>	<b>4.51</b>

<sup>1</sup>This report is intended for review by HCPF only, and is not for public distribution unless authorized by HCPF. All returned surveys are being submitted to HCPF. The electronic data entry spreadsheet file is available to HCPF upon request.



# Morning Sun Financial Services 2017 Client Satisfaction Survey Report

## Page 1 of a Returned Survey (for reference)



### Morning Sun Annual Client Satisfaction Survey

As a managing employer in the CDASS program, please rate the services provided to you by the Financial Management Services (FMS) Provider you are affiliated with. 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 NA 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 **November 27, 2017**.

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

**1. Please rate trainings and/or resources provided by Morning Sun at enrollment.**

	Always 5	4	Sometimes 3	2	Never 1	N/A
Printed enrollment materials are easy to read/understand. ....	●	○	○	○	○	○
Training I received from Morning Sun about how to fill out and submit timesheets was helpful. ....	●	○	○	○	○	○
I know how to contact Morning Sun if I have questions. ....	●	○	○	○	○	○

**2. Please rate the assistance provided by your FMS with questions you have about online resources.**

	Excellent 5	4	Average 3	2	Very Poor 1	N/A
Using my FMS' website. ....	○	○	○	○	○	●
Online timesheet submission. ....	○	○	○	○	○	●

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

	Always 5	4	Sometimes 3	2	Never 1	N/A
Are respectful? .....	●	○	○	○	○	○
Answer the phone? .....	●	○	○	○	○	○
Return your call or email within one (1) business day? .....	●	○	○	○	○	○
Clearly answer your question or concern? .....	●	○	○	○	○	○

**4. Please rate these services provided by your FMS.**

	Excellent 5	4	Average 3	2	Very Poor 1	N/A
Assistance completing FMS enrollment paperwork. ....	●	○	○	○	○	○
Timeliness in processing FMS enrollment paperwork. ....	●	○	○	○	○	○
Paying your Attendants - on time. ....	●	○	○	○	○	○
Paying your Attendants - accurately. ....	●	○	○	○	○	○

**5. 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
	●	○	○	○	○	○

If you have comments or suggestions, please submit them in the comment section provided on the back of this survey. Please note that your comments will not be read immediately by your FMS provider. If you need immediate assistance please contact your FMS provider directly.

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

Please flip the page.

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Page 2 of a Returned Survey (for reference)



Annual Client Satisfaction Survey

Please use this space for any additional feedback about services received from your FMS provider.

[Large empty rectangular box for providing additional feedback]

Client's Name (Optional\*) - please print:

\*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 **November 27, 2017**

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# Morning Sun Financial Services 2017 Client Satisfaction Survey Report

## Morning Sun Financial Services Survey Results

1. Please rate trainings and/or resources provided by Morning Sun at enrollment.	Number (#) and Percent (%) of Answers by Rating Value								Avg			
	1		2		3		4			5		N*
	#	%	#	%	#	%	#	%		#	%	
Printed enrollment materials are easy to read/understand.	0	0.0%	0	0.0%	6	9.7%	14	22.6%	42	67.7%	62	4.58
Training I received from Morning Sun about how to fill out and submit timesheets was helpful.	0	0.0%	1	1.8%	1	1.8%	14	25.0%	40	71.4%	56	4.66
I know how to contact Morning Sun if I have questions.	0	0.0%	0	0.0%	1	1.7%	10	16.9%	48	81.4%	59	4.80
2. Please rate the assistance provided by your FMS with questions you have about online resources.	Number (#) and Percent (%) of Answers by Rating Value								Avg			
	1		2		3		4			5		N
	#	%	#	%	#	%	#	%		#	%	
Using my FMS' Website.	2	4.3%	1	2.2%	10	21.7%	8	17.4%	25	54.3%	46	4.15
Online timesheet submission.	0	0.0%	3	6.5%	7	15.2%	5	10.9%	31	67.4%	46	4.39
3. When contacting your FMS with a question or concern, staff members...	Number (#) and Percent (%) of Answers by Rating Value								Avg			
	1		2		3		4			5		N
	#	%	#	%	#	%	#	%		#	%	
Are respectful?	0	0.0%	2	3.3%	0	0.0%	4	6.6%	55	90.2%	61	4.84
Answer the phone?	1	1.6%	0	0.0%	6	9.8%	9	14.8%	45	73.8%	61	4.59
Return your call or email within one (1) business day?	1	1.6%	0	0.0%	3	4.9%	8	13.1%	49	80.3%	61	4.70
Clearly answer your question or concern?	0	0.0%	2	3.3%	2	3.3%	7	11.5%	50	82.0%	61	4.72
4. Please rate these services provided by your FMS.	Number (#) and Percent (%) of Answers by Rating Value								Avg			
	1		2		3		4			5		N
	#	%	#	%	#	%	#	%		#	%	
Assistance completing FMS enrollment paperwork.	0	0.0%	2	3.3%	4	6.7%	7	11.7%	47	78.3%	60	4.65
Timeliness in processing FMS enrollment paperwork.	1	1.6%	2	3.3%	4	6.6%	8	13.1%	46	75.4%	61	4.57
Paying your Attendants - on time.	0	0.0%	1	1.6%	2	3.3%	10	16.4%	48	78.7%	61	4.72
Paying your Attendants – accurately.	0	0.0%	0	0.0%	2	3.3%	8	13.1%	51	83.6%	61	4.80
5. My overall satisfaction with my FMS can be described as:	Number (#) and Percent (%) of Answers by Rating Value								Avg			
	1		2		3		4			5		N
	#	%	#	%	#	%	#	%		#	%	
	0	0.0%	1	1.6%	3	4.9%	9	14.8%	48	78.7%	61	4.70
<b>Totals</b>	5	0.6%	15	1.8%	51	6.2%	121	14.8%	625	76.5%	817	4.65

\* N = total number of responses for the question



### Open-Ended Survey Comments

Thank you for all services. 1- Thanks for the program.
Rebeca answers the phone saying "I'm Busy"
Rebecca has always been helpful & getting answers as quickly as she gets them if she needs to go to another source for answers.
Morning Sun folks have been wonderful to work with. Quickly resolve issues and are always helpful and polite.
Very Satisfactory
I cannot view my monthly budget reports & have contacted Rebecca Sturdevant about this problem. The response I ge[t] is that Rebecca & the person can see the report so it must be my problem. It is " <u>my problem</u> " That is my point. I cannot view my reports & no one at Morning Sun seems to care!!! My wife even had a long conversation with Cheryl Van Instrom at Morning Star. The problem still exists & the solution was to mail reports. I received reports thru August 2017. I was not mailed any reports for September. I was told that I would not have to call every month to get a copy of the reports mailed to me, so that has not worked out either. Morning Star has shown very poor customer support/service.
Help w/ low vision accessibility to internet information & training but since I've been a client for so long we've worked it out, though I wasn't able to attend the one day training an hour away from me. Also, would have been helpful if FMS staff sat down w/ me & helped formulate a list of chores/duties for my aides.
The employees at Morning Sun, that I have worked with are exceptional, always helping me with <u>all</u> questions and concerns I may have had. They are very courteous and pleasant. The ease of working with this company is <u>exceptional</u> . Great company & great employees! I would recommend this company to everyone who needed this type of service.
I wish it was easier to get ahold of payroll. I have had continuous problems with employees receiving the pre-paid debit card(s). I really wish you would update the time sheet system to include more time slots during the day. It can be difficult to combine hours into fewer time slots without having employees overlap. This might be okay if I were immediately notified that there was an overlap, however I usually find out several days later when it is too late to change the time sheets without employees receiving late payment. Despite this, I would have to say Rebecca Sturdevant (sp?) has done an excellent job, promptly answering any of my concerns, in lieu of others when I am unable to get ahold of them.
Rebecca Sturdevant is always helpful & kind. She immediately takes care of any issues I might have. Very good!
Thank you very much
Way better than Public Partnership, PPL!
Training may need to be ongoing. Possibly have someone come to house to train...then come again 2 months later, or even one month later to review or answer questions.



### **Open-Ended Survey Comments**

Even though I have the "formula" for calculating final cost of employee's hours worked to plan, I can't make the math work. The online access to monthly statements has never worked for me. For a time these were being mailed to me monthly, and then this just stopped. So no accountability there. Mid-year the "cost to you" chart was revised, and a notice was sent that the YTD calculation had been incorrect. Was the overcharge refunded to my plan? Is anyone auditing the financial part?

Morning Sun is much nicer to work with than was my experience with PPL. Do wish notifications would be sent when there is an unprocessed time sheet, so one doesn't get overlooked. I do payroll for nearly 500 people, and provide both accountability for being able to verify check calculation figures and customer service to notify supervisor + employees of unprocessed time.