



Procedure Title: Experience of Care Surveys	Procedure #: 11-001	<u>Review Dates</u>	
Category: Community Relations Subject: Experience of Care Surveys	Prepared by: Customer Services Approved by: DocuSigned by: <i>Rich Francisco</i> Rich Francisco, Executive Director	05/06/2026	
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I. PURPOSE

- A. To assure customers and community partners of HealthWest have the opportunity, at least annually, to express their satisfaction with services.
- B. To establish monitoring and evaluation protocols to be used by the Customer Services Department.

II. APPLICATION

All employees and contracted providers of HealthWest.

III. DEFINITIONS

A. Customer: Includes:

- 1. All individuals receiving services through HealthWest.
- 2. All agencies/providers referring individuals for services or accepting referrals from HealthWest.
- 3. All agencies/individuals providing services contracted by HealthWest.
- 4. Legal guardians/parents for those individuals receiving HealthWest services.

IV. PROCEDURE

A. Customer Satisfaction Survey Process

HealthWest will use the following methods to gather customer satisfaction data from its customers:

- 1. Annually
 - a. Customers will be given the opportunity to respond to the Experience of Care Survey at least once per year.

- b. HealthWest customers receiving services from contracted providers will be given the opportunity to respond to a satisfaction survey pertaining to each contracted service they receive. Implementation of surveys and sharing of results are to be included in each provider's contract OR is included during contract site visits.
- b. As problems are identified, individual-focused surveys will be developed and implemented for internal and/or external customers.

2. Ongoing

- a. Comment Cards (Q039) will be available for individual customers at all HealthWest locations.

The questionnaires will be placed in the lobbies with a drop box available for the completed surveys.
- c. Focus groups will be held as needed.
- c. As problems are identified, individual-focused surveys will be developed and implemented for internal and/or external customers. These issues will also be assessed on an ongoing basis and monitored by the primary worker and written in the individual's record.

C. Satisfaction Survey Monitoring Process

- 1. The assigned staff person receiving the completed surveys will ensure strict confidentiality is maintained.
- 2. The assigned staff person will review completed returned surveys for follow-up requests and/or customer complaints. Surveys with a follow-up request and those with a comment identifying a problem or an issue that supervisors/administration should be aware of will be forwarded to one of the following:
 - a. The assigned Customer Services staff person for follow-up will:
 - i. Contact the customer within one (1) week of receiving the survey requesting follow-up
 - ii. Track and record follow-up contacts and outcomes.
 - b. Administration, Recipient Rights, Program Managers, or Program Supervisors with a Follow-up Request Form (Q056).
 - i. Review survey comments and take steps, if possible, to correct any identified problems or issues.
 - ii. Complete the Follow-up Request Form and return it to the staff person within ten (10) calendar days of receipt.

3. The assigned staff person will also forward, as appropriate, completed returned surveys with positive comments about specific staff to that staff person's supervisor.
4. The assigned staff person completing the aggregate reports will remove all customer-specific identifying information from the comments before including them in the written report.
5. Satisfaction Survey Reports will be generated. Due to the disproportionate numbers of customers surveyed per program, reporting time frames may vary.
6. Satisfaction survey aggregate reports and satisfaction survey follow-up reports will be:
 - a. Reviewed by the Customer Services Department whose responsibility will be:
 - i. To monitor for re-occurring issues/problems.
 - ii. Ensure follow-up is being completed in a timely manner.
 - iii. Identify issues needing administrative attention.
 - iv. Request a plan of correction or further follow-up by a specific supervisor or program if aggregate rating scores are significant outliers for several quarters.
 - b. Distributed to HealthWest Administration, Quality Council, Outcomes and Evaluations Committee, and other appropriate committees.
 - c. Presented to the Consumer Advisory Committee.
 - d. Posted to the HealthWest intranet and internet sites.
6. The assigned staff person will complete a trending report to be distributed annually to HealthWest Administration and Program Managers.
7. Satisfaction Survey reports will be presented to the HealthWest Board at least annually.

Authors Initials GR/hb