

# AAA Case Management



**2016 CLIENT SURVEY RESULTS**

# Background



# Case Management



- The provision of services by providers whose responsibility is to enable clients, and when appropriate clients' families, to gain access to and receive a full range of appropriate services in a planned, coordinated, efficient, and effective manner.
- (from State DHS SPC definition).

# Case Management Services



- Assessing needs via home visits.
- Developing Individualized Service Plans.
- Arranging services for older adults or their caregivers.
- Monitoring progress toward goals.



# Primary Goal of Case Management Services

- To enable older adults to safely remain in their own homes and communities.



# Study Purpose



- To measure client satisfaction of case management services with the goal of using this input “in order to improve program efficiency and ensure the program is effectively helping senior adults.”
  - AAA Access Committee
  - QTR2, 2014-Revised Work Plan

# Data Collection



# Survey Instrument



The screenshot shows a Windows Internet Explorer browser window displaying the ACL (Administration for Community Living) website. The page is titled "POMP: Case Management" and is part of the "Program Results" section. The ACL logo is prominently displayed at the top, along with the text "U.S. Department of Health and Human Services Administration for Community Living". A search bar is visible with "ACL.gov" entered. The main content area features the "Administration on Aging (AoA)" logo and the "Performance Outcome Measurement Project POMP" logo. The "Case Management" section describes the survey instrument, stating it has 20 questions covering service quality, length of time receiving services, and decision-making involvement. Below this, there are links for "Mail" and "Telephone" versions of the survey instrument, each with a "DOC" (Document) and a "PDF" (Portable Document Format) option. A sidebar on the right lists "Programs", "Program Results", and "Aging Statistics", with a link to "Compendia of Projects Awarded by Fiscal Year". The bottom of the browser window shows the taskbar with various open applications, including "Inbox - Bastean@...", "Microsoft Word", "Microsoft Excel - W...", "Consumer Survey...", "POMP: Instruments...", "POMP: Case Man...", and "Desktop". The system clock indicates the time is 4:20 PM on 01/15/2015.

DaneDesktop-Office2010 - Citrix online plug-in

POMP: Case Management - Windows Internet Explorer

http://www.acl.gov/Program\_Results/POMP/CaseManagement.aspx

File Edit View Favorites Tools Help

ACL

U.S. Department of Health and Human Services  
Administration for Community Living

Search: ACL.gov Go

Help and Resources Newsroom Programs and Activities Data and Evaluations Funding Opportunities About ACL

Administration on Aging (AoA)

Performance Outcome Measurement Project POMP

Case Management

The Case Management Survey Instrument has 20 questions. The items cover the quality of service, the length of time receiving services, and the extent of involvement in decision making about services.

Mail

- Case Management Survey Instrument — Mail (DOC)
- Case Management Survey Instrument — Mail (PDF)

Telephone

- Case Management Survey Instrument — Telephone (DOC)
- Case Management Survey Instrument — Telephone (PDF)

Programs

Program Results

Aging Statistics

Compendia of Projects Awarded by Fiscal Year

Last Modified: 12/31/1600

Start

Inbox - Bastean@... Microsoft Word Microsoft Excel - W... Consumer Survey... POMP: Instruments... POMP: Case Man... Desktop Address

Citrix XenApp - A... DaneDesktop-Offi...

4:20 PM 01/15/2015



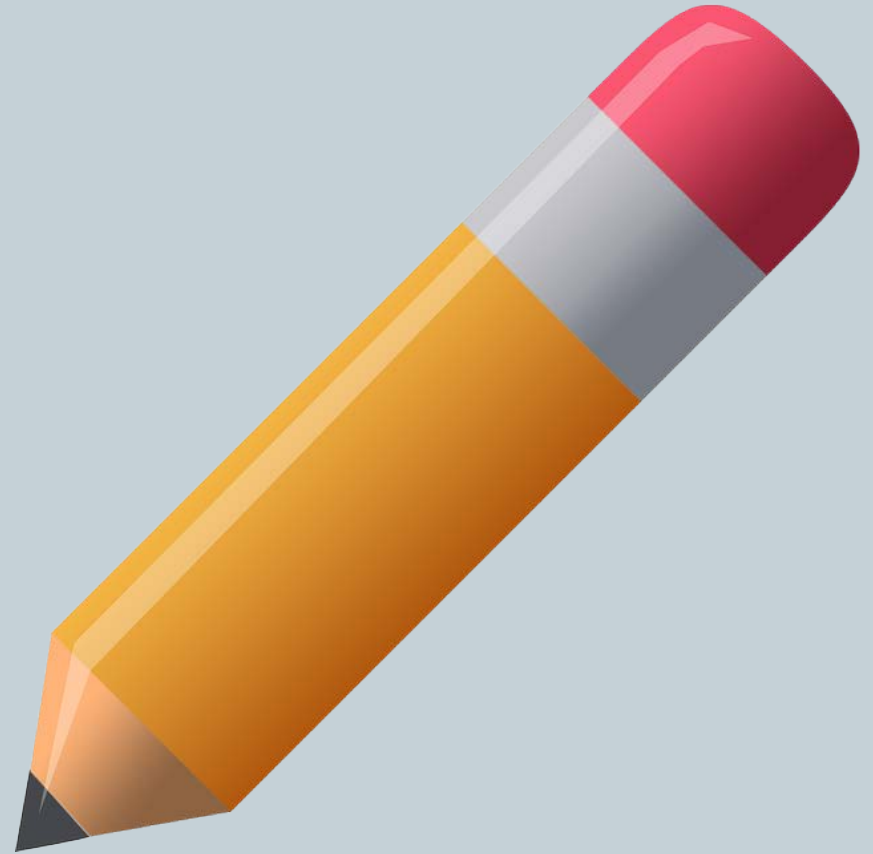
# POMP Survey Examines



- Client involvement in planning for services.
- Offered a choice in services and service providers.
- Needed services are obtained.
- Able to contact the case manager when needed.
- Case managers return phone calls in a timely manner.
- Services help the individual continue to live at home.

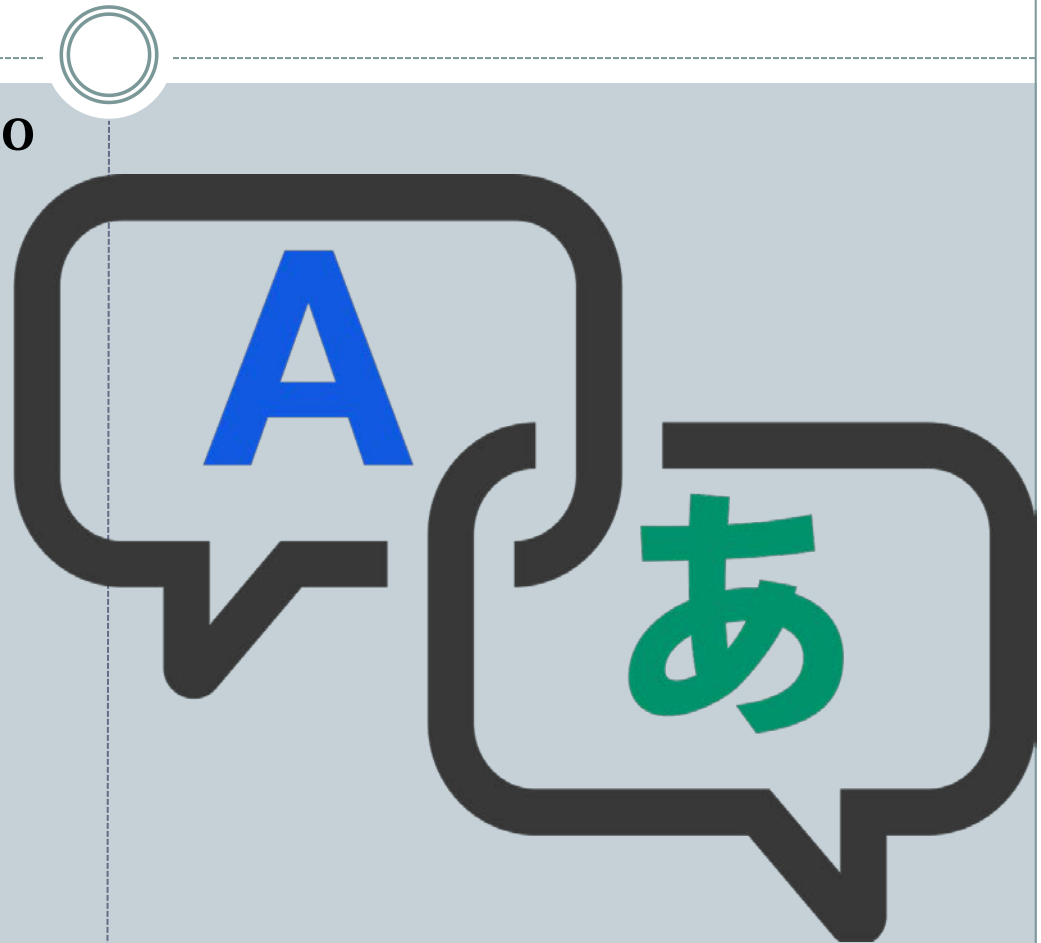
# Revisions to ACL Survey

- Included program name and case manager.
- Did not ask about last time services were received.
- Changed question on whether services helped live at home to live where choose.
- Retained question on service satisfaction omitted in most recent version of ACL survey.



# Translation

- Survey was translated into Spanish.
- NESCO identified clients who were to receive the Spanish/English version of the survey.



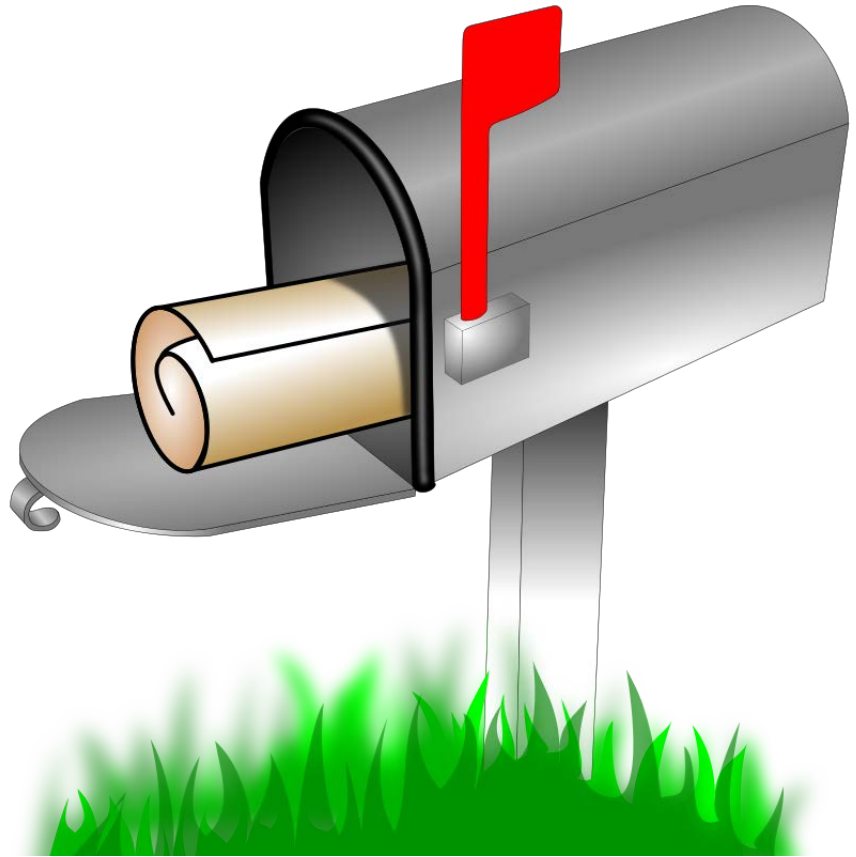
# Survey Population

- Clients reported to the DCDHS Information System.
- Who received case management services between January 1 and August 31, 2016.
- Who were still living.
- Had a viable mailing address.
- Addresses were updated by focal points which also identified guardians as needed.
- Pulled random sample.



# Survey Method

- A total of 1,199 survey forms mailed October 13-17, 2016.
- Postage paid business reply envelope.
- Due date was November 7.
- Surveys with bad addresses and a forwarding address in Dane County were re-mailed until 2 weeks prior to due date.



# Response Rate



- 488 surveys returned.
- 24 excluded –no services received in 2016.
- 464 useable survey forms.
- 40.6% response rate overall.
- 29% response rate on English/Spanish forms.
- 20% is acceptable response rate for a one-time mail survey.



# Sample for Analysis

- Excluded those with no service in 2016 or only service was equipment loan or Medicare Part D (Drug) sign up.
- Sample of 314 forms pulled from remaining 402 forms using the RAND function in Excel based on percentage of clients served during study period by Agency.



# Findings



## DEMOGRAPHICS



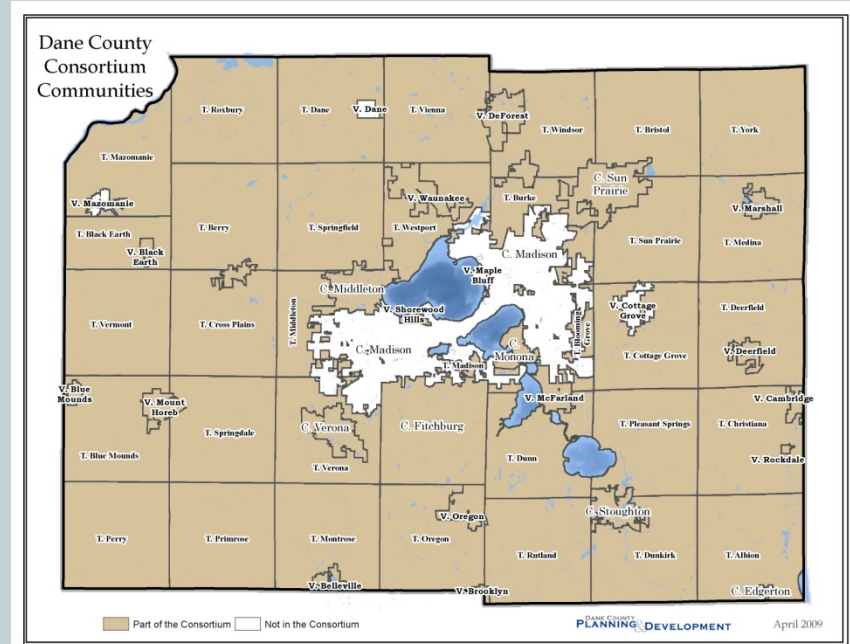
# Respondents in Sample Compared with Clients Served

- Respondents in the sample used for the overall program analysis were representative of clients served during the study period in terms of gender, race/ethnicity, generation, and average length of service.



# Municipalities – Not Represented

- City of Edgerton (portion of which is in Dane County.)
- Town of Christiana
- Town of York
- Village of Rockdale
- Village of Shorewood Hills



# Findings



## **PARTICIPATION IN SERVICE PLANNING**

# Participation in Service Planning

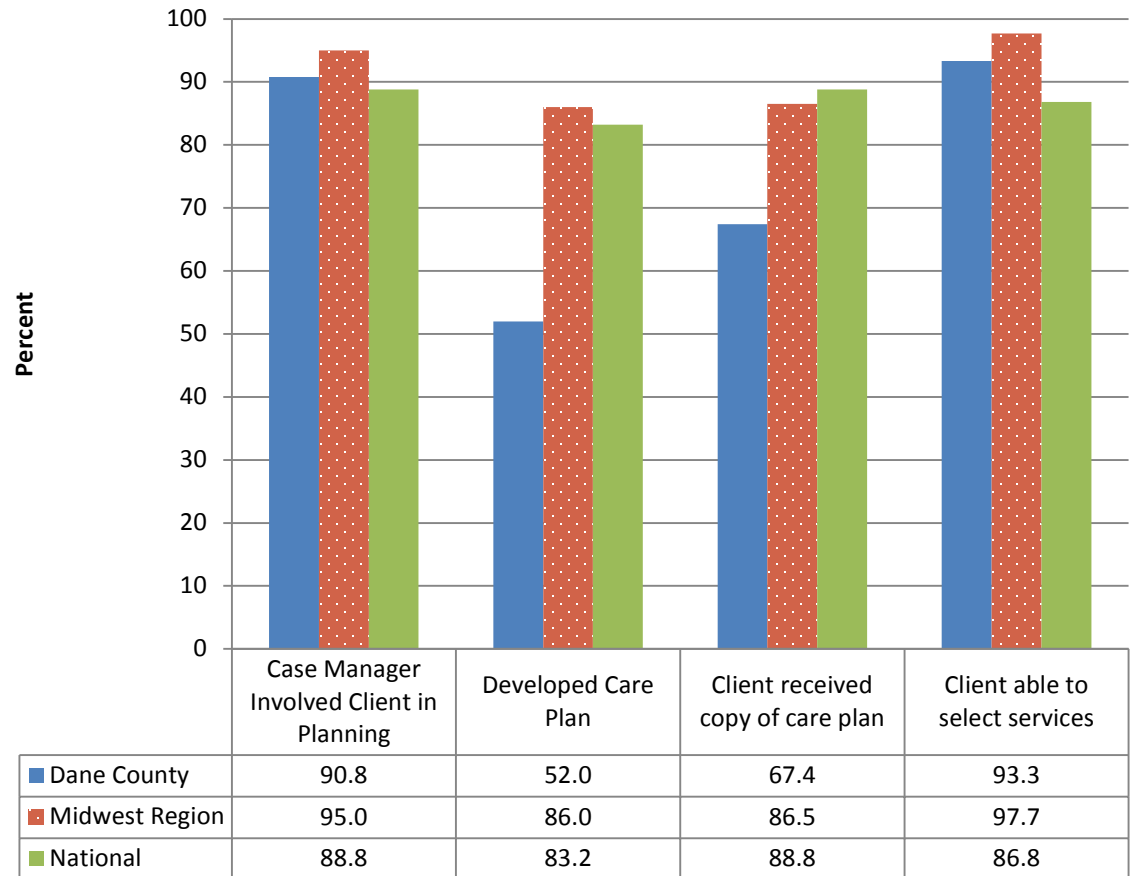
- 91% of respondents indicated their case manager involved them in discussing and planning services.
- 52% indicated their case manager developed a care plan.
- Of those, 67% received a copy of the care plan.
- 93% were able to select the services they received.



# Participation in Service Planning

Dane County respondents in 2016 were significantly less likely to indicate their case manager developed a care plan for the services they needed than their Midwest Region and National counterparts who participated in the 2015 National Survey of Older American Act Participants.

**Percent of Respondents Indicating "Yes" to Items on Participation in Service Planning: Dane County Compared with 2015 Midwest Census Region and National Data**



# Findings



## **SERVICE QUALITY**

# Service Quality



- **92% of case managers return phone calls promptly.**
- **95% of case managers explain services in a way client can understand.**

# Service Quality



- 96% of respondents reported their case manager treats them with respect.
- 83% of respondents indicated their case manager does a good job setting up services.

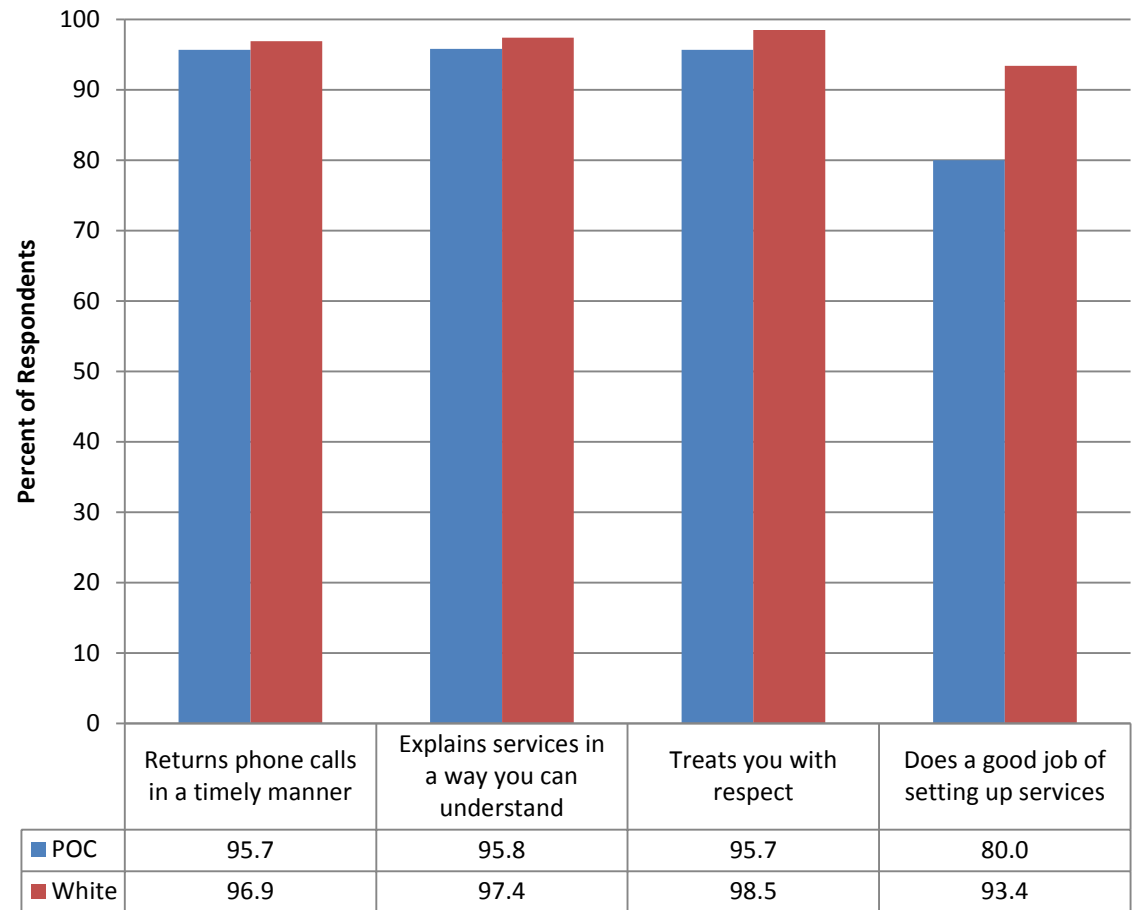


## Service Quality

Persons of Color were significantly less likely than Whites to indicate their case manager did a good job of setting up services for them.

Baby Boomers (born 1946-1964) were significantly less likely to indicate their case manager returned phone calls promptly.

**Percent of Respondents Indicating "Yes" to Items on Service Quality: Persons of Color Compared with Whites**



# Findings



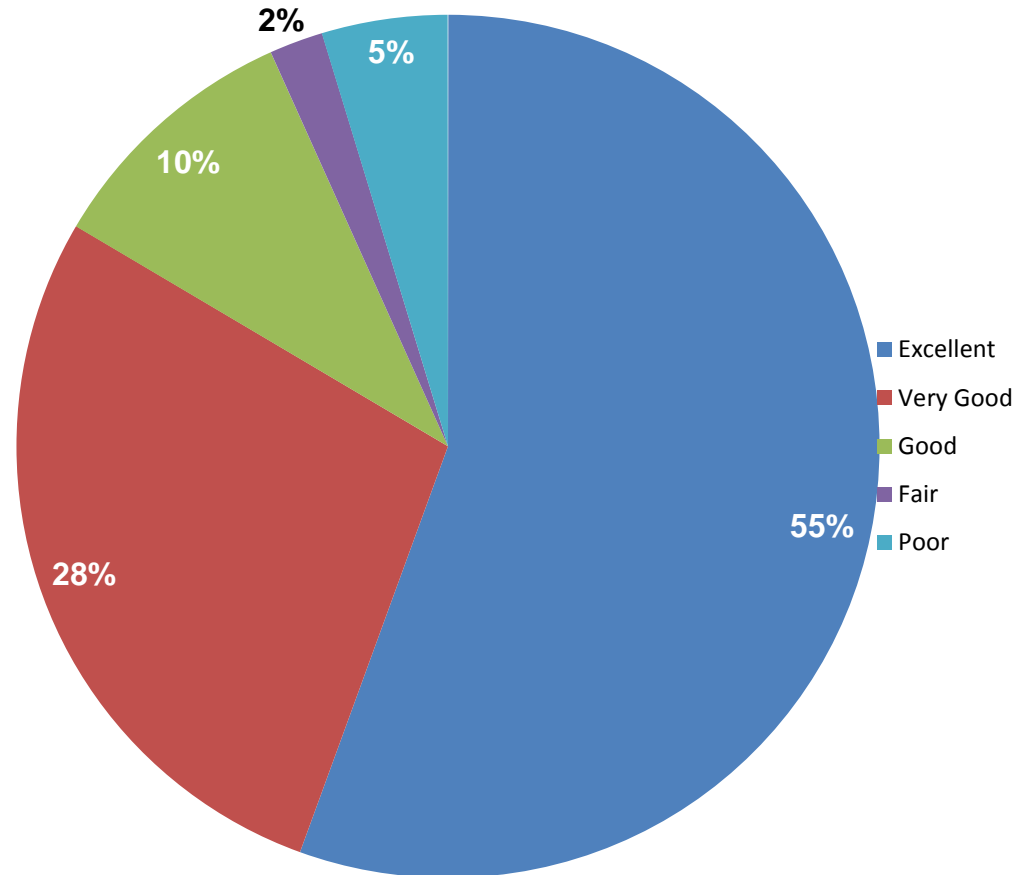
**OVERALL QUALITY**

## Overall Quality

94% of survey respondents were satisfied with the case management services received.

Overall, case management services were rated highly – 55% excellent, 28% very good, and 10% good.

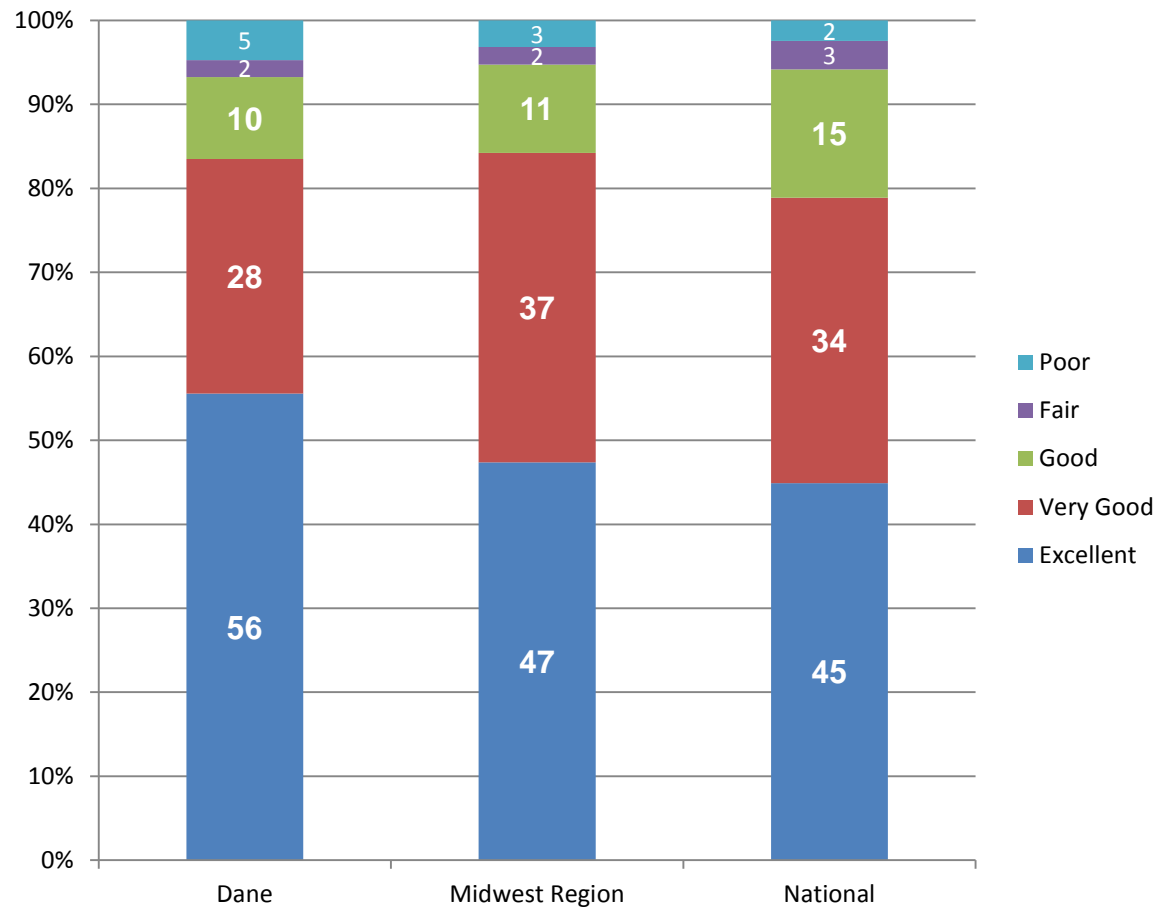
### Overall Quality of Case Management Services



## Overall Quality

While 2016 Dane County sample survey respondents were more likely to rate case management services as “Excellent,” the percent of persons rating the services positively (excellent, very good, good) was virtually the same for Dane County at 94% as it was for the 2015 survey results for the Midwest Census Region at 95% and the National results at 94%.

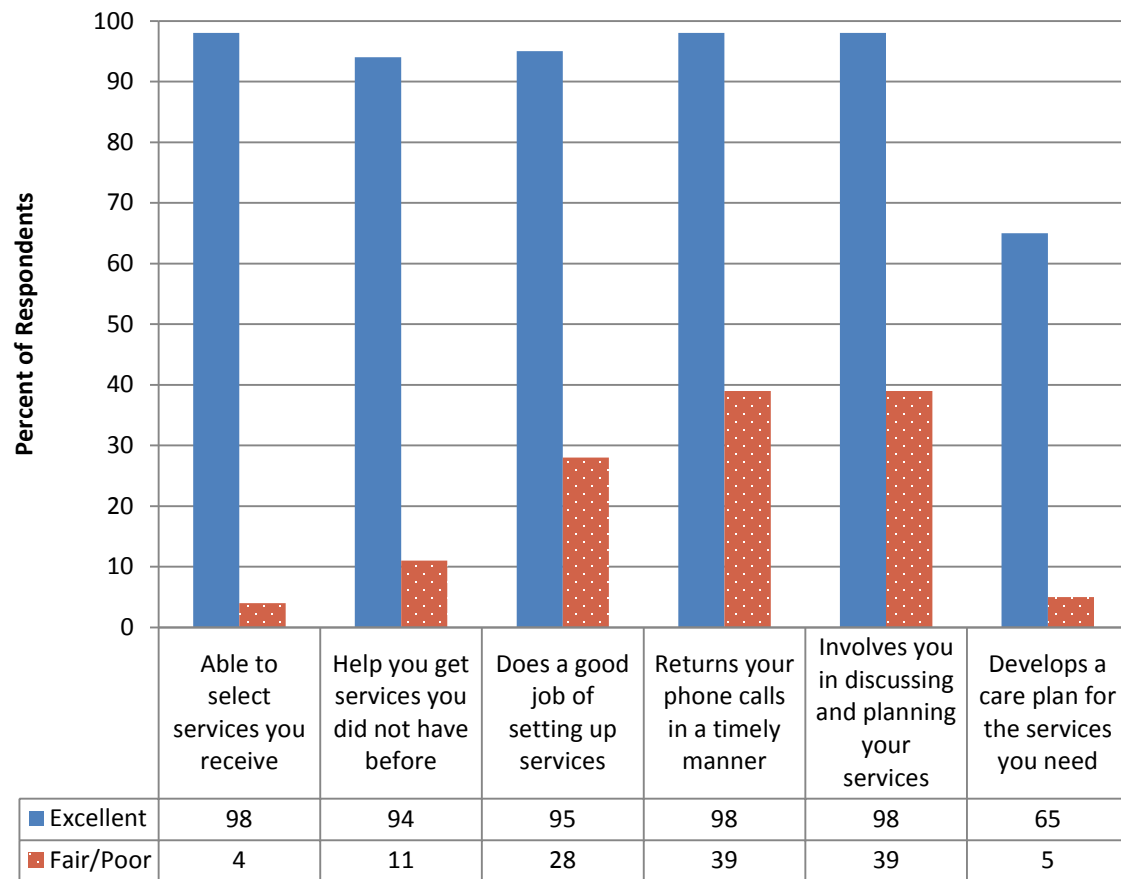
**Respondent Rating of Overall Service Quality:  
Dane County Compared with 2015 Midwest  
Region and National Data**



## Overall Quality

Differences were also noticed based on length of service. Persons who received services for 6-12 months were less likely (42%) than persons who received services for 31-36 months (75%) to rate the services as “excellent.”

**Percent of Survey Respondents Rating the Overall Quality as "Excellent" Compared with Those Rating it "Fair" or "Poor" on Key Survey Items Rated Positively (Yes)**



# Findings



## **BENEFITS**

# Benefits

- 81% indicated case manager helped get services did not have before.
- 92% situation is better because of case manager's help.
- 88% indicated services helped them continue to live where they chose.



# Recommendations

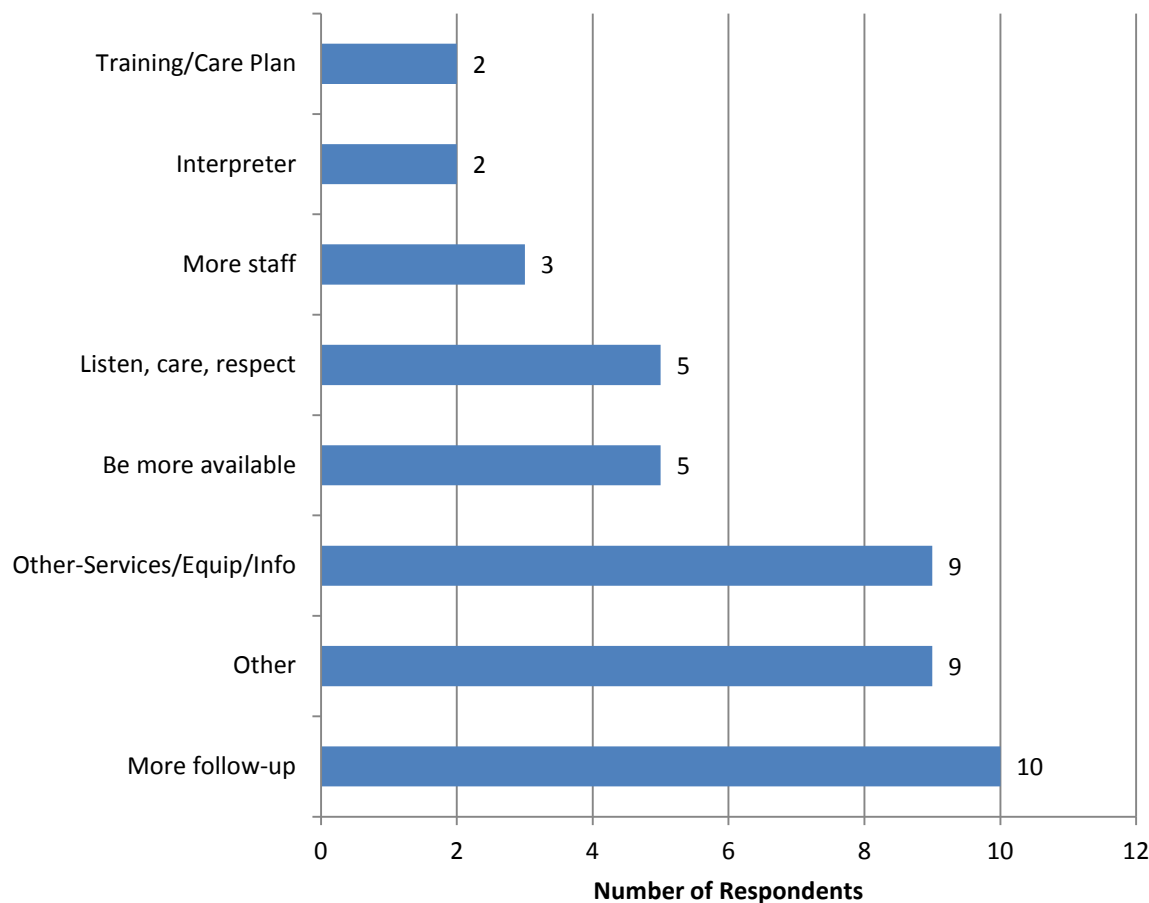




## Recommendations

Of the 144 respondents to this question, 35% had none and another 34% had praise for the service and/or case manager. The graph shows the responses for the remaining 44 respondents.

### Responses to Question, "What recommendations do you have for improving the case management services?"



# Recommendations



- Other – Services/ Equipment/ Information: additional services (6) such as help with raking leaves, legal help, physical therapy, good reliable housecleaning; more information on other services (2); or equipment needs (1).

# Recommendations



- Other: “I’d like brownies delivered.” – jokingly (1); comments about home-delivered meals (2); being own payee (1); less bureaucracy (1); make duplicate copy of calendar of events (1); add not applicable to more questions on survey (1); other personal comments.

# Next Steps



# Next Steps



- **Share with AAA Access Committee and AAA Board, general public via posting on the AAA web site.**
- **Revise survey instrument and methodology to address any issues.**



# Questions



# Thank you!

