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## Consumer Satisfaction/Receiving

### Issued August 2011

**Purpose:**

Inform staff of process issues that have surfaced related to receiving and consumer satisfaction as well as share some of the IRIS changes and best practices to assist with these.

**Rationale:**

Since implementation of the changes to the receiving process including the additional questions for consumer satisfaction, several internal process issues have surfaced and this has presented an opportunity to clarify best practice.

The consumer satisfaction component has also afforded an opportunity to increase consumer engagement and provide for some efficiency in the DVR process. We have provided some suggestions in this email based on specific roles and duties within DVR. Please review the email in detail as it will provide some ideas for effective time and process management that may be of assistance in your day to day activities and approaches to some tasks. While not every suggestion may be relevant to you, the information provided may be helpful to begin process discussion at the local WDA and team levels.

The topics below characterize some of the process issues that have surfaced.

**Receiving:**

Receiving has not been done as early in the process as would be efficient in some locations. Some staff have been reliant for various reasons (time, number of PO's, tracking issues etc.) on CCP notification to start their receiving. Others have opted to complete receiving when they get a report or copy of the invoice (Note: Not all service providers send copies of reports or invoices to the WDA, nor are they required to do so under the DVR service agreements). The practice of waiting for the CCP receiving alert notification will likely cause a delay in payment to providers and is not recommended. For best fiscal practice, receiving should be done as soon as the service has been provided to the DVR consumer, and should be based on contact with the consumer, not solely on the report of the provider.

**Communication:**

Asking the Consumer Satisfaction questions directly to DVR consumers has increased contact with consumers and has brought an increased focus on how we facilitate communication. Some communication issues are structural (lack of address, phone, email), some are disability related (ability to read printed materials, understand the level of communications) some are based on how we use that interaction effectively and the expectations we share and expect of consumers.

**Survey:**

The Consumer Satisfaction survey was designed to be simple and connected as closely as possible in real time to service provision. It has always been an expectation that staff would be getting feedback on services provided via purchase orders. Practice in getting this information was varied and often issues with services and providers were identified long after payments were made. Staff across the board have done an excellent job in connecting with consumers and getting the necessary responses! Thanks for this good work.

**In the first 3 weeks, 96% of consumers were reached and completed the survey! GREAT JOB!**

## IRIS CHANGES

### Changes made to date:

- The batch send of emails to consumers has been eliminated at the time a purchase order is created. This process caused confusion for some consumers because in many cases the service had not been completed and surveys were being returned prior to service delivery. The batch send will still be done at the time CCP sends a receiving notice.
- DVR staff can still send an email at any time on the purchase order to the consumer by selecting the SEND CONSUMER SURVEY button. **DVR staff still have the option to mail the survey and/or talk to the consumer directly by telephone in order to obtain responses to the survey questions.**

### Changes anticipated by the end of August:

- Allowing Staff to enter and save either receiving or consumer satisfaction answers separately. But both must be completed prior to receiving process being completed and allowing the invoice to be paid.
- Adding a new button for services where surveys are NOT needed :
  - Administrative fee
  - Bus pass
  - Medical records fee
  - No show fee
  - On the Job Training wages **NEW!**
  - Payroll set-up fees **NEW!**
  - Shipping/Handling charges
  - Supported Employment Outcome Incentive Payments **NEW!**
- Comments from PO and Invoice Auto pushed to other comments
- General Case Note automatically created from PO comment
- Alert - Receiving Message and Comment -When the CCP click the send receiving message a comment is automatically generated along with the alert and CCP would like these to include the consumer's name, to facilitate field staff identification of the involved consumer case.
- PO Warning Message - List PO Lines Not Received - On the PO Quick and PO page on load of the screen display a warning message at the top of the screen listing the PO Lines not received. Any PO related to that case. So this should be listing all PO's for that case that have not been received.
- Auto Create General Case Note When Receiving Record Completed - one general case note for when receiving is entered and one for when consumer satisfaction is entered.
- Alert - Manual Alert Creation from Unliquidated List on Case Fiscal Summary.
- Eliminating automatic email at the time we receive the receiving request from CCP. Manual email will still exist.
- Adding a new column on the Unliquidated Report showing if receiving has been completed.
- Adding a new report which will show if receiving or survey questions have not been completed.

### TIPS

The tips listed below may be identified for certain positions; however, some of the tips may be relevant to other staff depending on how local processes have been arranged. It is suggested you review them all.

## **Counselors:**

- Verify with the consumer initially and continue to discuss methods and a process for ongoing communication and correspondence.
- Discuss the various points within the DVR process of communication requirements and expectations for engagement: Examples-Consumer satisfaction, monthly contact, provider contact, return of phone calls etc. and that these requisite skills are important for success in employment.
- Provide a good model by returning requests for contact made by consumers.
- Discuss the use of a preferred communication method. (Phone, email, US mail, text messages etc.)
- Only send emails out for consumers who identify email as their main method of contact
- Explain that additional services may not be authorized if we lose contact with consumers and their plan for employment may be delayed as a result
- Utilize foreign language interpreting if needed.
- Explain contents of correspondence in a manner the consumer understands.
- Establish detailed plans to communicate with consumers who have disability related communication challenges (e.g. blind, deaf, nonverbal)
- Discuss the survey when meeting with consumers. Explain why it is important.
- Ask consumers to provide the information for the survey as soon as they receive/complete the services arranged through DVR.
- Add responsibility elements to an IPE.
- Establish a set time/date for consumers to call you or a team member.
- Explain the role of outside service providers
- If you speak with consumers and get information about receiving share that as soon as possible with staff completing receiving.

## **Consumer Case Coordinators:**

- When leaving a voicemail for the consumer to respond to the CS survey, be specific and state "call me back and leave message if I do not answer, letting me know if you are satisfied with \_\_\_ service and would you recommend"
- Requester should be the VRC and the alert recipient should be the CCC.
- Do not approve PO's so that you are best able to complete receiving/surveys on your own.
- Show consumers an example of the survey and explain what we will need from them.
- Use the Unliquidated report to identify PO's that may need receiving. It may be a bit tedious way of keeping track but works.
- VRC is provided at team meetings with the most current Open PO list from the dashboard to review for cancellation/finalizing orders that are completed or not happening.
- Utilize the Change Receiver option when staff will be out for a period of more than 2 days so receiving alerts are attended to.
- Mail satisfaction survey with copy of the purchase order when consumer needs a copy of the purchase order, and explain that it should be completed and returned after the service is done.
- CCC reviews Open PO's independently on a weekly basis.
- Confirm correct contact information (mailing address/telephone #/email address) when meeting or talking with consumers
- Review fiscal summary tab to look for Unliquidated orders when in contact with a consumer
- Complete survey questions even if you can't complete the survey and forward answers onto a team member who can complete survey/receiving
- If unable to do receiving due to the incomplete survey, please note this in the comments section of the invoice. This will alert CCP that you are waiting for a survey response.

- CCP will now only send only two receiving notices per order/invoice. Within 48 hours after the first receiving alert to the Alert Recipient, the 2nd alert will go to the WDA Director/VR Supervisor, and they will be expected to handle the situation at that point, along with the fiscal expert for the WDA.

#### **TRAINING MATERIALS**

- <http://cs-dvr/iris/Shared%20Documents/Forms/AllItems.aspx> (Select 7. July 2011)

**THANKS TO ALL DVR STAFF AND ESPECIALLY TO THOSE WHO CONTRIBUTED IDEAS FOR IMPROVEMENT.**