

CMS Medicare Beneficiary and Family Centered Care Satisfaction Survey Revision Crosswalk

| Question Number |             | Original Wording   | Revision for Complaint Beneficiaries  | Revision for Appeal Beneficiaries  | Rationale for Revision   |
|-----------------|-------------|--|---|--|--|
| Original        | Revised     |  |   |  |  |
| Q1              | Q1          | Our records show that on [DATE] you filed [a complaint about the quality of care you or another person received under Medicare / an appeal about your or another person’s Medicare benefits]. Is that right?   | Our records show that on [DATE] you filed a complaint about the quality of care you or another person received under Medicare. Is that right?   | Our records show that on [DATE] you filed an appeal about your or another person’s Medicare benefits. Is that right?   | <ul style="list-style-type: none"> <li>No change – shown with 2 variations (complaint and appeal)</li> </ul>   |
| Intro to Q2     | Intro to Q2 | The questions in this survey <b>will</b> refer to the [Medicare quality of care complaint that you filed on the date shown in Question 1 as “your quality of care complaint” / Medicare <b>benefits</b> appeal that you filed on the date shown in Question 1 as “your appeal”]. | The questions in this survey <b>will</b> refer to the Medicare quality of care complaint that you filed on [DATE] as “your quality of care complaint”.  | The questions in this survey <b>will</b> refer to the Medicare <b>benefits</b> appeal that you filed on [DATE] as “your appeal”.   | <ul style="list-style-type: none"> <li>Simplified language</li> </ul>  |
| Q2              | Q2          | Have you <b>gotten a resolution on</b> your quality of care complaint / appeal?<br><br>If No, <b>please return the survey in the postage-paid envelope.</b>  | Have you <del>gotten a resolution on</del> <b>received the results or findings in response to</b> your quality of care complaint.<br><br>If No, <del>please return the survey in the postage-paid envelope</del> <b>go to #4.</b> | Have you <del>gotten a resolution on</del> <b>received the results or findings in response to</b> your appeal?<br><br>If No, <del>please return the survey in the postage-paid envelope</del> <b>go to #4.</b> | <ul style="list-style-type: none"> <li>Improved specificity of question</li> <li>Based on cognitive testing findings, respondent could describe their experience even if they didn’t report having final findings of their case</li> </ul> |
| Q3              | Q3          | How satisfied are you with the <b>resolution of</b> your [quality  | How satisfied are you with the <del>resolution of</del> <b>results or</b>   | How satisfied are you with the <del>resolution of</del> <b>results or</b>  | <ul style="list-style-type: none"> <li>Improved specificity of question</li> </ul>   |

|             |             |   |  |   |  |
|-------------|-------------|---|--|---|--|
|             |             | of care complaint / appeal]?  | <b>findings in response to</b> your quality of care complaint?   | <b>findings in response to</b> your appeal?   |  |
| Q4          | Q4          | Please give us your comments on the <b>resolution</b> of your [quality of care complaint / appeal].   | Please give us your comments on the <del>resolution</del> <b>of results or findings in response to</b> your quality of care complaint <b>and concerns</b> .  | Please give us your comments on the <del>resolution</del> <b>of results or findings in response to</b> your appeal.   | <ul style="list-style-type: none"> <li>Improved specificity of question</li> </ul>   |
| Intro to Q5 | Intro to Q5 | <p><b>Interactions with the Intake Specialist</b></p> <p>The next questions are about the way your [quality of care complaint/appeal] was handled <b>from the start</b>. The questions will refer to the person you <b>first</b> spoke with when you called to file your [quality of care complaint/appeal] as the “Intake Specialist”. The Intake Specialist would have collected the details about your [quality of care complaint/appeal].</p> | <p><b>Quality of Care Complaint Process</b></p> <p>These next questions are about the way your quality of care complaint was handled <del>from the start</del> <b>and the process</b> that [QIO NAME], the Quality Improvement Organization (QIO) in your state used to get information and coordinate the steps in the process.</p> <p>The questions will refer to the representative from [QIO NAME], the QIO in your state as the “QIO representative”. You may have spoken to the QIO representative when you filed your quality of care complaint, or in a follow-up conversation after your quality of care complaint was filed.</p> | <p><b>Appeal Process</b></p> <p>These next questions are about the way your appeal was handled <del>from the start</del> <b>and the process</b> that [QIO NAME], the Quality Improvement Organization (QIO) in your state used to get information and coordinate the steps in the appeal process.</p> <p>The questions will refer to the representative from [QIO NAME], the QIO in your state as the “QIO representative”. You may have spoken to the QIO representative when you filed your appeal, or in a follow-up conversation after your appeal was filed.</p> | <ul style="list-style-type: none"> <li>Changed reference to QIO representative</li> <li>“from the start” removed based on cognitive testing. Respondent could consider the “start” to be significantly before s/he filed a complaint/appeal</li> </ul> |
| Q5          | -           | When you spoke with the Intake Specialist, how satisfied were you that he or she was as helpful as you  | <b>REMOVED FROM SURVEY</b>   | <b>REMOVED FROM SURVEY</b>  | <ul style="list-style-type: none"> <li>Not measuring interactions with “Intake Specialist” given CMS change in processing of</li> </ul>  |

|              |   |   |                     |                     |   |
|--------------|---|---|---------------------|---------------------|---|
|              |   | thought they should be?   |                     |                     | cases   |
| Q6           | - | When you spoke with the Intake Specialist, how satisfied were you that he or she explained things in a way you could understand?  | REMOVED FROM SURVEY | REMOVED FROM SURVEY | <ul style="list-style-type: none"> <li>Not measuring interactions with “Intake Specialist” given CMS change in processing of cases</li> </ul>                 |
| Q7           | - | When you spoke with the Intake Specialist, how satisfied were you that he or she spent enough time with you?  | REMOVED FROM SURVEY | REMOVED FROM SURVEY | <ul style="list-style-type: none"> <li>Not measuring interactions with “Intake Specialist” given CMS change in processing of cases</li> </ul>                 |
| Q8           | - | When you spoke with the Intake Specialist, how satisfied were you that he or she listened carefully to you?   | REMOVED FROM SURVEY | REMOVED FROM SURVEY | <ul style="list-style-type: none"> <li>Not measuring interactions with “Intake Specialist” given CMS change in processing of cases</li> </ul>                 |
| Q9           | - | When you spoke with the Intake Specialist, how satisfied were you that he or she showed respect for what you had to say?  | REMOVED FROM SURVEY | REMOVED FROM SURVEY | <ul style="list-style-type: none"> <li>Not measuring interactions with “Intake Specialist” given CMS change in processing of cases</li> </ul>                 |
| Intro to Q10 | - | <p><b>Interactions with the Case Manager</b></p> <p>The next questions will refer to the person who called you back after your [quality of care complain / appeal was filed as the “Case Manager”. The Case Manager would</p> | REMOVED FROM SURVEY | REMOVED FROM SURVEY | <ul style="list-style-type: none"> <li>No longer distinguishing between Case Manager and Intake Specialist given CMS change in processing of cases</li> </ul> |

|     |     |   |  |  |  |
|-----|-----|---|--|--|--|
|     |     | have contacted you about the resolution of your [quality of care complaint / appeal].   |  |  |  |
| Q10 | Q5  | Did you speak to a Case Manager about your [quality of care complaint / appeal] on the phone?<br><br>If No, go to Q20         | Did you speak to a Case-Manager-QIO representative about your quality of care complaint on the phone?<br><br>If No, go to Q20 #14  | Did you speak to a Case-Manager-QIO representative about your appeal on the phone?<br><br>If No, go to Q20 #14   | <ul style="list-style-type: none"> <li>• Changed reference to QIO representative</li> <li>• Removed “on the phone” as process does not require telephone follow-up in all cases</li> </ul>                           |
| Q11 | -   | The Case Manager had all the information that you gave to the Intake Specialist about you [quality of care complaint/appeal]. | <b>REMOVED FROM SURVEY</b>   | <b>REMOVED FROM SURVEY</b>   | <ul style="list-style-type: none"> <li>• No longer distinguishing between Case Manager and Intake Specialist given CMS change in processing of cases</li> </ul>  |
| Q12 | Q11 | The Case Manager was as responsive to your [quality of care complaint / appeal] as you thought they should be.                | The Case-Manager QIO representative was as responsive to your quality of care complaint as you thought they he or she should be.   | The Case-Manager QIO representative was as responsive to your appeal as you thought they he or she should be.  | <ul style="list-style-type: none"> <li>• Changed reference to QIO representative</li> <li>• Improved grammar</li> </ul>  |
| Q13 | Q12 | The Case Manager understood your situation.   | The Case-Manager QIO representative understood your the situation related to your quality of care complaint.   | The Case-Manager QIO representative understood your the situation related to your appeal.  | <ul style="list-style-type: none"> <li>• Changed reference to QIO representative</li> <li>• Improved specificity of question</li> </ul>  |
| Q14 | Q13 | The Case Manager talked with you about resources that were available to help you.   | The Case-Manager QIO representative talked with you about resources that were programs and services in your community that are available to help you with your health and wellbeing. | The Case-Manager QIO representative talked with you about resources that were programs and services in your community that are available to help you with your health and wellbeing. | <ul style="list-style-type: none"> <li>• Changed reference to QIO representative</li> <li>• Improved specificity of question. Based on cognitive testing findings, beneficiaries did not have a clear and</li> </ul> |

|     |     |   |  |  |  |
|-----|-----|---|--|--|--|
|     |     |   |  |  | consistent understanding of the term “resources”   |
| Q15 | Q6  | When you spoke with the Case Manager, how satisfied were you that he or she was as helpful as you thought they should be?   | <del>When you spoke with the Case Manager,</del> How satisfied were you that he or she <b>the QIO representative</b> was as helpful as you thought <del>they</del> <b>he or she</b> should be? | <del>When you spoke with the Case Manager,</del> How satisfied were you that he or she <b>the QIO representative</b> was as helpful as you thought <del>they</del> <b>he or she</b> should be? | <ul style="list-style-type: none"> <li>• Changed reference to QIO representative</li> </ul>                                |
| Q16 | Q7  | When you spoke with the Case Manager, how satisfied were you that he or she explained things in a way you could understand? | <del>When you spoke with the Case Manager,</del> How satisfied were you that he or she <b>the QIO representative</b> explained things in a way you could understand?                           | <del>When you spoke with the Case Manager,</del> How satisfied were you that he or she <b>the QIO representative</b> explained things in a way you could understand?                           | <ul style="list-style-type: none"> <li>• Changed reference to QIO representative</li> </ul>                                |
| Q17 | Q8  | When you spoke with the Case Manager, how satisfied were you that he or she spent enough time with you?                     | <del>When you spoke with the Case Manager,</del> How satisfied were you that he or she <b>the QIO representative</b> spent enough time with you?   | <del>When you spoke with the Case Manager,</del> How satisfied were you that he or she <b>the QIO representative</b> spent enough time with you?   | <ul style="list-style-type: none"> <li>• Changed reference to QIO representative</li> </ul>                                |
| Q18 | Q9  | When you spoke with the Case Manager, how satisfied were you that he or she listened carefully to you?                      | <del>When you spoke with the Case Manager,</del> How satisfied were you that he or she <b>the QIO representative</b> listened carefully to you?  | <del>When you spoke with the Case Manager,</del> How satisfied were you that he or she <b>the QIO representative</b> listened carefully to you?  | <ul style="list-style-type: none"> <li>• Changed reference to QIO representative</li> </ul>                                |
| Q19 | Q10 | When you spoke with the Case Manager, how satisfied were you that he or she showed respect for what you had to say?         | <del>When you spoke with the Case Manager,</del> How satisfied were you that <b>the QIO representative</b> showed respect for what you <del>had to say</del> <b>said</b> ?                     | <del>When you spoke with the Case Manager,</del> How satisfied were you that he or she <b>the QIO representative</b> showed respect for what you <del>had to say</del> <b>said</b> ?           | <ul style="list-style-type: none"> <li>• Changed reference to QIO representative</li> <li>• Simplified language</li> </ul> |
| Q20 | Q14 | Did you receive any letters about your [quality of care complaint / appeal]?  | Did you receive <b>get any forms or letters from the Centers for Medicare &amp; Medicaid</b>   | Did you receive <b>get any forms or letters from the Centers for Medicare &amp; Medicaid</b>   | <ul style="list-style-type: none"> <li>• Simplified language</li> <li>• Improved specificity of question</li> </ul>        |

|     |     |   |  |  |  |
|-----|-----|---|--|--|--|
|     |     | If No, go to Q25  | Services or the QIO about your quality of care complaint?<br><br>If No, go to Q25#19   | Services or the QIO about your appeal?<br><br>If No, go to Q25#19  | <ul style="list-style-type: none"> <li>Added “forms” based on cognitive testing findings: beneficiaries referred to written materials they received as letter, form letters, and forms</li> </ul>                              |
| Q21 | Q15 | How satisfied were you that the letter(s) you got about your [quality of care complaint / appeal] explained things in a way you could understand? | How satisfied were you that the letters(s) forms or letters you got about your quality of care complaint explained things in a way you could understand? | How satisfied were you that the letters(s) forms or letters you got about your appeal explained things in a way you could understand?        | <ul style="list-style-type: none"> <li>Added “forms” based on cognitive testing findings: beneficiaries referred to written materials they received as letter, form letters, and forms</li> </ul>                              |
| Q22 | Q16 | How satisfied were you that the letter(s) you got about your [quality of care complaint / appeal] contained all the information you needed?       | How satisfied were you that the letters(s) forms or letters you got about your quality of care complaint contained had all the information you needed?   | How satisfied were you that the letters(s) forms or letters you got about your appeal contained had all the information you needed?          | <ul style="list-style-type: none"> <li>Added “forms” based on cognitive testing findings: beneficiaries referred to written materials they received as letter, form letters, and forms</li> <li>Simplified language</li> </ul> |
| Q23 | Q17 | How satisfied were you that the letter(s) you got about your [quality of care complaint / appeal] showed respect for your concerns?               | How satisfied were you that the letters(s) forms or letters you got about your quality of care complaint showed respect for your concerns?               | How satisfied were you that the letters(s) forms or letters you got about your appeal showed respect for your concerns?                      | <ul style="list-style-type: none"> <li>Added “forms” based on cognitive testing findings: beneficiaries referred to written materials they received as letter, form letters, and forms</li> </ul>                              |
| Q24 | Q18 | How satisfied were you that the letter(s) you got about your [quality of care complaint / appeal] had the same information that you               | How satisfied were you that the letters(s) forms or letters you got about your quality of care complaint had the same information that were              | How satisfied were you that the letters(s) forms or letters you got about your appeal had the same information that were consistent with the | <ul style="list-style-type: none"> <li>Added “forms” based on cognitive testing findings: beneficiaries referred to written materials they received</li> </ul>   |

|     |     |  |   |  |   |
|-----|-----|--|---|--|---|
|     |     | <p>were told in telephone conversations?</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Very satisfied</li> <li><input type="checkbox"/> Satisfied</li> <li><input type="checkbox"/> Neither satisfied nor dissatisfied</li> <li><input type="checkbox"/> Dissatisfied</li> <li><input type="checkbox"/> Very dissatisfied</li> </ul> | <p>consistent with the information you were told in telephone conversations with the QIO?</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Very satisfied</li> <li><input type="checkbox"/> Satisfied</li> <li><input type="checkbox"/> Neither satisfied nor dissatisfied</li> <li><input type="checkbox"/> Dissatisfied</li> <li><input type="checkbox"/> Very dissatisfied</li> <br/> <li><input type="checkbox"/> I did not have any telephone conversations with the QIO.</li> </ul>                    | <p>information you were told in telephone conversations with the QIO?</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Very satisfied</li> <li><input type="checkbox"/> Satisfied</li> <li><input type="checkbox"/> Neither satisfied nor dissatisfied</li> <li><input type="checkbox"/> Dissatisfied</li> <li><input type="checkbox"/> Very dissatisfied</li> <br/> <li><input type="checkbox"/> I did not have any telephone conversations with the QIO.</li> </ul> | <p>as letter, form letters, and forms</p> <ul style="list-style-type: none"> <li>• Improved specificity of question</li> <li>• Added a tailored inapplicable response based on cognitive testing findings.</li> </ul> |
| Q25 | Q19 | <p>Using any number from 0 to 10 where 0 is the word [quality of care complaint / appeal] process possible and 10 is the best [quality of care complaint / appeal] process possible, what number would you use to rate the overall [quality of care complaint / appeal] process?</p>   | <p>In responding to your quality of care complaint [QIO NAME], the QIO in your state gathered information about your quality of care complaint, explained the complaint steps, and gave you the results or findings of your case. We are referring to this as the “quality of care complaint process”. Using any number from 0 to 10 where 0 is the word quality of care complaint process possible and 10 is the best quality of care complaint process possible, what number would you use to rate the overall quality of</p> | <p>In responding to your appeal [QIO NAME], the QIO in your state gathered information about your appeal, explained the appeal steps, and gave you the results or findings of your case. We are referring to this as the “appeal process”. Using any number from 0 to 10 where 0 is the word appeal process possible and 10 is the best appeal process possible, what number would you use to rate the overall appeal process?</p>   | <ul style="list-style-type: none"> <li>• Added clarification on definition of process to improve specificity of question</li> </ul>   |

|                  |                  |   |  |  |   |
|------------------|------------------|---|--|--|---|
|                  |                  |   | care complaint process?  |  |   |
| <b>Q26</b>       | <b>Q20</b>       | Please give us your comments on the process that was used <b>to resolve</b> your [quality of care complaint / appeal]. Include any comments you have on what worked well, and suggestions you have on ways to improve <b>how</b> the process. | Please give us your comments on the process that was used <del>to resolve</del> <b>in responding to</b> your quality of care complaint. Include any comments you have on what worked well, and suggestions you have on ways to improve <b>how</b> the process. | Please give us your comments on the process that was used <del>to resolve</del> <b>in responding to</b> your quality of care complaint. Include any comments you have on what worked well, and suggestions you have on ways to improve <b>how</b> the process. | <ul style="list-style-type: none"> <li>• Simplified language</li> </ul> |
| <b>Thank you</b> | <b>Thank you</b> | <b>Thank you: Those are all the questions we have for you now</b>   | <b>Thank you for your participation.</b>   | <b>Thank you for your participation.</b>   | <ul style="list-style-type: none"> <li>• Simplified language</li> </ul> |